Infoview Report Template Reference

INFORMATION ABOUT ALL CURRENTLY AVAILABLE WIC INFOVIEW REPORT TEMPLATES

UPDATED 4/10/2023

Contents

Agency-Specific

Anoka – Scanned CTC Release

Revised 2.28.2017

Description: This report was developed for Anoka County but could potentially be used by other agencies. The output provides a list of participants, based on specified WIC Types, who were issued benefits during a specified time period at a specified agency and have had a CTC release scanned in the past year.

Columns: First Name, Last Name, DOB, WIC Type, Issued Date, Issued Time, Staff ID-Issued and Scan Date.

Some uses include:

- Obtain a list of participants with a CTC release scanned within the past year.

Blue Earth – One Call: Farmers' Market Using Local Use Question #5 & #6

Created 7.5.2017

Description: This report has been created specifically for Blue Earth Count CHS. It provides a list of households who have at least one member who currently belongs to Blue Earth County CHS and has "Release Signed – Opt In" selected for Local Use Question #6, Release Signed, and "Yes" selected for Local Use Question #5, FMNP Checks Received.

Columns: Authrepfirstname, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2 and Householdid.

Some uses include:

- Remind participants who received FM checks to use by the end of the season utilizing One Call Now services.
- Send other pertinent notification such as market closed, etc. on an as-need basis.

Countryside – WIC-MIIC-CTC

Description: This report was developed for Countryside to assist with merging immunization and well-child exam data for WIC appointments. It pulls all appointment information for the specified agency (NOTE: appointment information is purged from the database after 90 days).

Columns: Appointmentdate, Appointmentresource, Appointmenttime, Appointmentkept, Appointmenttypeid, Appt Type, Duration, Householdid, Statewicid, Servicesitename, Agencyid, Dateofbirth, Firstname, Middleinitial, Lastname, Gender, Interpreterneeded, Languge1, Motherfirstname, Motherlastname, Mailaddress, Mailcity, Mailstate, and Mailzip.

Some uses include:

- Obtain a list of all appointments scheduled at a specified agency.

Crow Wing Local Use Question #1 – Daily Appointments

Description: This report was developed specifically for Crow Wing and is based on the information they collect for Local Use Question #1 (Yes and No or Unknown). It provides a list and count of participants with appointments scheduled on a specified date at a specified clinic, a count of participants by appointment type for that date, and labels by household addressed to the authorized representative.

Columns (depending on report tab): Appt Time, SWID, First Name, Last Name, Telephone, Comment, Appt Type, Interpreter Needed, HHID, DOB, WIC Type, Authorized Rep's Name, Resource, Language, Currently High Risk, Mailaddress, Mailcity, Mailstate, Mailzip, Appointment Types, Resources, Total Appointments by Resource, and Total Appointments by Type.

Some uses include:

- Obtain a list of all appointments scheduled at a specified agency.
- Create mailing labels addressed to the authorized representative based on the answer to Local Use Question #1.
- Obtain a count of appointments by Appointment Types and Resources for a specified date based on the answer to Local Use Question #1.

Dakota – Unplanned Walk-ins (Local Use Question #3)

Revised 3.7.2018

Description: This report was specifically developed for Dakota County and their use of Local Use Question #3, "Unplanned Walk-ins". It provides a count and list of walk-in participants, by Clinic ID, as indicated by the selection a reason for Local Use Question #3 during the specified time period.

Columns (depending on report tab): WIC Type, Clinic ID, Clinic ID-Issued, Clinic ID-Not Issued, CLINIC TOTAL, AGENCY TOTAL, Walk-in Reason, Date of Walk-in, State WIC ID, WIC Type (based on benefit issuance), Date of Walk-in, Issued Date, Issued Time, # of Sets Issued, Cert on Walk-in Date, and Time LUQ Answered

Some uses include:

Track number of participants being served outside of standard benefit issuance schedule by Clinic.

Hennepin Clinics – Certified Teens

Description: This report was developed specifically for Hennepin County. It provides a list and count of women who were less than 20 years old when certified during the specified time period and a count by conception age, grouped by WIC Type, and based on whether the clinic is considered a Minneapolis clinic site or a suburban clinic site.

Columns (depending on report tab): Site ID, SWID, Conception Age, Age at Cert, Date of Birth, and WIC Status.

Some uses include:

- Identify participants less than 20 years old certified during a specified time period.
- Obtain a count, by WIC Type and type of clinic, of participants less than 20 years old by age of conception.

Hennepin CTC Initial & Follow-up Contacts

Description: This report was developed specifically for Hennepin County and is based on specified values selected for Local Use Question #1. It provides a count and list of CTC contacts based on participants certified or with an MCA performed during the specified time period.

Columns (depending on report tab): Contact Date, Household ID, Last Name, First Name, Proxy Name, Date of Birth and PMI Number.

Some uses include:

- Identify participants with CTC contacts during a specified time period based on Local Use Question #1.
- Obtain a count of participants with CTC contacts during a specified time period based on Local Use Question #1.

McLeod Local Use Question #1 – Yes

Description: This report was created specifically for McLeod County. It provides a list and count of infants and children who have a Nutrition Education Contact where the topic of "Well-Child Checks/Immunizations" was selected during a specified time period and who have answered Yes to Local Use Question #1.

Columns: Participant Name, DOB, NE Contact Date, Infant/Child, Local Use Answer Date, and SWID.

Some uses include:

- Identify infants/children with a nutrition contact for Well-Child Checks/Immunizations and Yes for Local Use Question #1.
- Obtain a count of infants/children with a nutrition contact for Well-Child Checks/Immunizations and Yes for Local Use Question #1.

Olmsted CTC Contacts: Participants under 21 Y.O.

Description: This report was developed specifically for Olmsted County. It provides a count and list of participants who are less than 21 years of age and who have had a Certification or Mid-certification Assessment (MCA) completed during the specified time period. Each tab of the report is based on the option selected for Local Use Question #1.

Columns: SWID, Last Name, First Name, DOB, Cert Start Date, MCA Completed Date, Telephone #, Address, City, Zip Code and PMI #.

Some uses include:

- Identify participants under 21 y.o. who were certified or had an MCA performed during the specified time period by the answer to Local Use Question #1.
- Obtain a count of participants under 21 y.o. who were certified or had an MCA performed during the specified time period by the answer to Local Use Question #1.

Olmsted – Documentation Compliance

Description: This report was developed specifically for Olmsted County to help assess documentation compliance when services are provided. Specifically, whether a note was written for recerts, Mid-certification Assessments (MCAs) and infant contacts and whether a postpartum exit nutrition education was documented for postpartum women.

Columns: HHID, SWID, WIC Type, DOB, Cert Date, MCA Date, Note?, PP Exit Card?, and Last Appt Kept.

Some uses include:

- Assist with auditing required documentation for services provided.

Rice – Missed Appointments with TM or VM in Comment in Field 1

Revised 9.11.2017

Description: This report was developed specifically for Rice County who is entering “TM” or “VM” into the Comment 1 field in Demographics to indicated participants interested in receiving a text message or voicemail if an appointment is missed. The report output provides a list of participants, with either TM or VM in the Comment 1 field, who have missed an appointment scheduled at the specified agency during the specified time period.

Columns: Clinic ID, Appt Date, Appt Type, HHID, Participant's Name, Authorized Rep’s Name, Comment 1, Telephone #, and Language.

Some uses include:

- Obtain a list of participants who missed appointment during the specified time period and want to be notified.

Rice – Missed Benefit Pickup with TM or VM in Comment in Field 1

Description: This report was developed specifically for Rice County who is entering “TM” or “VM” into the Telephone Comment1 field to indicate participants interested in receiving a text message if they miss their benefit pick-up. Both tabs provide a list of participants who’s Last

Date to Use (LDTU) falls within the specified time period and who currently belong to the specified agency.

Columns: Clinic ID, HHID, Participant's Name, Comment1, Telephone #, Language, Last Set's LDTU, Next Appt, Cert End Date and WIC Type.

Some uses include:

- Obtain a list of participants who missed a nutrition ed contact/benefit pick-up during the specified time period and want to be notified.

Rice Referral Contacts with TM/VM in Comment 1

Created 8.8.2016

Description: This report was developed specifically for Rice since they use TM/VM in the Comment 1 field to indicate whether communications should be provided via text message or voicemail. However, it has been developed so that other agencies that may use this same method can also use this report template. The output provides three lists of participants who belong to the specified agency and have been referred to the specified referral organization during the specified time period. The lists are based on whether the participant has TM, VM or TM/VM in the Comment 1 field in Demographics. A reference tab provides Referral IDs based on the specified agency.

Columns (depending on report tab): Referral ID, Referral Name, Active, Clinic ID, Referral Date, First Name, Last Name, Telephone, Comment 1, HHID, SWID, and WIC Type.

Some uses include:

- Identify participants that have received a specific type of referral and whether they want to be contacted via text message or voicemail for outreach.

Sherburne C&TC – Local Use Question #1

Description: This report was specifically developed for the Sherburne County WIC Program. It has one tab and provides a list of infants and children who have answered "Yes" to Local Use Question #1, have "MA" or "MN Care" selected in the Insurance Type field in Demographics, and who were issued benefits by Sherburne during the specified time period.

Columns: Clinic ID, HH ID, SWID, Participant Name, DOB, Insurance, Issued Date, Cert Start Date, CTC Answer Date, and Clinic ID.

Some uses include:

- Obtain a list of participants issued benefits during the specified time period who have MA or MN Care for insurance and have answered "Yes" to Local Use Question #1 for CTC referrals.

Scott Carver CAP – Missed Nutrition Visit with Local Use Question #2

Created 6.27.2016

Description: This report was developed for Scott Carver CAP agency but may be used by either agencies if collecting information in Local Use Question #2. It provides a list of participants who belong to the specified agency and clinic(s) who are eligible to receive benefits and who have missed a nutrition visit/benefit pick-up based on their last set's Last Date to Use (LDTU) being during a specified time period. The report provides the last appointment scheduled, which could be in the past or future; excludes those not eligible for issuance; and displays the option selected from Local Use Question #2. Labels can also be created for the household or by participant.

Columns (depending on report tab): HHID, SWID, Last Set's LDTU, Next Appt, Participant's Name, Authorized Rep's Name, LUQ #2, Telephone 1, Telephone 2, MCA Due Date, Cert End Date, WIC Type, DOB, Language, Interpreter, Clinic ID, Mailing Address, City, State and Zip Code.

Some uses include:

- Help improve caseload by identifying participants overdue to pick-up benefits for reminder calls/outreach based on clinic where the participant is currently assigned.
- Identify participants who want to be contacted via text based on Local Use Question #2 selection.
- Create mailing labels for outreach.

Sibley Local Use Question #1 – Yes

Created 10.27.2016

Description: This report was developed specifically for Sibley County. It provides a list of infants and children who currently belong to Sibley, have a Nutrition Education Contact of "Well-Child Checks/Immunizations" selected during the specified time period, and have answered Yes to Local Use Question #1.

Columns: Participant Name, DOB, NE Contact Date, Infant/Child, Local Use Answer Date, and SWID.

Some uses include:

- Identify infants and children for C&TC outreach who have indicated it is OK to share their information with C&TC.

St. Paul-Ramsey CTC

Description: This report was developed specifically for St. Paul-Ramsey. It provides a count and list of infants who had a cert or MCA performed at St. Paul-Ramsey during the specified time period and have "Yes" selected for Local Use Question #1 (CTC).

Columns: Last Name, First Name, DOB, WIC Type, SWID, Authorized Rep LN, Authorized Rep FN, Address, City, Zip Code, PMI # and Cert Date or MCA Date.

Some uses include:

- Identify infants and children who were certified or had an MCA performed during the specified time period and answered "Yes" to Local Use Question #1 for CTC outreach.

St. Paul-Ramsey Peer Participants

Description: This report was developed specifically for Ramsey County but could be used by other agencies. It provides a list of participants that have an alert with the word "peer" and an appointment scheduled after the specified date.

Columns: HHID, First Name, Last Name, DOB, Address, City, State, Zip, Telephone #, and Language.

Some uses include:

- Identify participants who are using peer services and have an appointment scheduled - assist with peer services.

Wright County - Program Participants Characteristics & Scanned Tennessen

Revised 12.1.2016

Description: This report was developed for Wright County but could be used by other agencies that scan Tennessen Warning documents. It provides unduplicated counts and lists of participants for the specified agency who are counted at least once during the specified time period. The counts are based on the agency where the participants were first counted during the specified time period. The output provides two different sets of information: 1) participants with a scanned Tennessen Warning and 2) - participants without a scanned Tennessen Warning. The unduplicated counts include: households, participants and participants by gender, age category, ethnicity, race, education level (for women 24 years and older), household size, and type of health insurance.

Columns (depending on report tab): Counts by Household, participants, gender, age category, ethnicity, race, education level, family size, and insurance type; HHID, SWID, First Name, Last Name MI, DOB< Address, City, State, Zip Code, County, Gender, Race, Ethnicity, Insurance Type, Cert End Date and Last Set LDTU.

Some uses include:

- Obtain an unduplicated count of participants by gender, age category, ethnicity, race, education level, family size, and/or type of health insurance for a specified agency.
- Identify participants without a scanned Tennessen Warning.

Agency Management

Agencies & Clinics List

Revised 5.9.2016

Description: A list of MN WIC local agencies and clinics; including names and IDs.

Some uses include:

- Statewide list of agency names, agency IDs, clinic names and clinic IDs.
- Reference for agency/clinic IDs.

Clinic Productivity by WIC Type

Created 2.10.21

Description: Counts of Recertifications, new Certifications, Mid-certification Assessments (MCAs), and Nutrition Education Contacts (NECs) performed at the specified clinics during the specified time period. All counts are by WIC Type and agency or clinic. A daily count by agency and clinic is also provided.

Some uses include:

- Obtain a count of participants being provided services by WIC Type for an agency or clinic.

Email Addresses

Description: A list of email addresses for all participants that belong to the specified agencies.

Columns: Agency ID, Email address, HHID and Clinic ID.

Pending Proof of Income, Identity and/or Residency

Created 4.8.2020

Description: A list of currently certified participants who currently belong to the specified agency with a Last Date to Use (LDTU) during the specified time period who have a PENDING PROOF of income, identity or residency. The report displays Local Use Question #1 in the output but agencies do not need to use Local Use Codes to use this report. An OPTIONAL input control allows the output to be filtered by Clinic ID.

Columns: Clinic ID, HHID, SWID, Proof Required, Cert Start Date, Last LDTU, Authorized Rep's Name, Telephone #, Comment, and Local Use Question #1.

Some uses include:

- Identify participants who may not have returned due to pending proof of income, identity and/or residency for outreach.

Transfers

Description: Counts and lists of households, and counts of participants, that have transferred during a specified time period from one clinic to another within a specified agency; into the specified agency from other agencies; and out of the specified agency to other agencies. The last tab is a reference of agency IDs and names.

Some uses include:

- Track the number of transfers between clinics.
- Track the number of transfers to and from agencies.
- Ensure all participants are transferred out of a closing clinic or agency.

Agency Management – Audits/Chart Reviews

Benefits Issued & Certs Performed on Specified Dates

Revised 2.2.22

Description: Provides a list and counts by specified agencies, of agencies and staff who have issued benefits or certified participants during the specified time period. A statewide count by agencies and staff is also provided.

Columns (depending on report tabs): Agency ID, Clinic ID, HHID, SWID, WIC Type, High Risk, Issued Date, Day, Issued Time, PFDTU, LDTU, PPTN Date, Redeemed?, Voided?, Staff ID, Cert Start Date, Cert Start Time, Totals, Number of Staff Issuing Benefits, Number of Participants Issued Benefits, Number of Staff Certifying, Number of Participants Certified, Issued Benefits?, Certified Participants?

Some uses include:

- Obtain a statewide count of participants provided WIC services (issuance or certification) during a specified time period by staff and Agency.
- Obtain a statewide count of the number of staff issued benefits, the number of participants issued benefits, number of staff certifying and number of participants certified by Agency.
- Identify staff issuing benefits or certifying statewide and the number of participants provided services by these staff during the specified time period.
- Obtain a statewide count of the number of participants issued benefits and participants certified by staff.

Benefits Issued & Certs Performed Outside of Information System Hours

Revised 2.2.22

Previous entitled: Benefits Issued & Certs Performed between 8:00 PM and 7:00 AM

Description: Provides a list and counts by specified agencies, of agencies and staff who have issued benefits or certified participants outside of the allowed Information System hours during the specified time period. A statewide count of agencies and staff is also provided.

Information System Hours

- 7:00 AM – 8:00 PM Monday – Friday
- 7:00 AM – 12:00 PM Saturday
- 7:00 AM – 2:00 PM Sunday

Columns (depending on report tabs): Agency ID, Clinic ID, HHID, SWID, WIC Type, High Risk, Issued Date, Day, Issued Time, PFDTU, LDTU, PPTN Date, Redeemed?, Voided?, Staff ID, Cert Start Date, Cert Start Time, Totals, Number of Staff Issuing Benefits, Number of Participants Issued Benefits, Number of Staff Certifying, Number of Participants Certified, Issued Benefits?, Certified Participants?

Some uses include:

- Verify staff from specific agencies are not using the Information System to perform WIC services outside of the allowed Information System hours.
- Verify whether any agencies or staff within the state are using the Information System to perform WIC services outside of the allowed Information System hours.
- Identify potentially fraudulent participant records or staff performing potentially fraudulent activities.

Certifications Completed by One Staff Person (SOD)

Revised 2.27.2019

Please also refer to the: Certifications Completed by One Staff Person (SOD) Overview Document

Description: A list and count of participants certified at the specified agency and clinic(s) during the specified time period for which one staff person was recorded for each required step of the certification. Participants are excluded from the report output if a "Separation of Duties (SOD) – Income" note has been written within 21 days prior to, on, or within 14 days after the certification by a different staff person than the certifier.

Columns (depending on report tab): Food Type, HHID, SWID, WIC Type, DOB, Cert Date, Cert Time, Cert Day, Cert Length, Certifier, PPT Sig, Risk Factors, Ht. In., Ht. 8ths, Wt. Lbs., Wt. Oz., Hgb or Exception Reason, SOD Scan, Staff Wrote Note, and Note Date.

Some uses include:

- Assist agencies with meeting the SOD auditing requirements for participants certified by one staff person.

Incomplete Certifications

Created 3.23.2020

Description: A list of participants who belong to the specified agencies with certifications started during the specified time period and not yet completed.

Columns: Clinic ID, HHID, SWID, and Cert Start Date

Some uses include:

- Identify participants with incomplete certifications.

Incomplete MCAs

Created 12.7.2016

Description: Provides a list and count of participants who currently belong to the specified agency and have a Mid-Certification Assessment (MCA) Guided Script (GS) that was started on or after the specified date and never completed or not completed correctly (no MCA Completed Date).

Columns: Current Agency Name, Current Agency ID, SWID, WIC Type (current), MCA Due Date, MCA Start Date, Staff Started MCA, MCA Agency ID and Completed Date.

Some uses include:

- Identify participants for whom the MCA was not completed correctly in order to fix the record prior to the next certification.
- Identify staff who may not be completing the MCA correctly and may need further training.

MCAs Completed or Not and Benefits Issued

Created 6.1.22

Description: A listing and count of participants who belong to the specified agency and are due for a Mid-Certification Assessment (MCAs) during the specified time period, and whether the MCA was completed, and benefits were issued. MCA appointments are identified by “mid” being part of the appointment name. Report users will need to input their agency’s Appointment Type IDs associated with MCAs, which are provided in the Reference Tab. This output includes an OPTIONAL input control that allows the report user to filter Tab 2 – MCAs (listing of participant) by clinic. (NOTE: the input controls selections are removed whenever the report is refreshed and the output will again include all clinics.)

Columns (depending on report tab): Tab1 - Agency ID, Appt ID, Mid-Certification Descriptions; Tab 2 - Clinic ID, HHID, SWID, WIC Type, MCA Appt Scheduled, MCA Appt Kept, MCA Due, MCA Date, MCA Staff, Cert End Date, Last Set LDTU, Sets after MCA Due, Issued by Staff; Tab 3 – Staff ID, Not Completed/Issued Benefits, 1 Set Issued, 2 Sets Issued, 3 Sets Issued, 4 or More Sets Issued; Tab 4 – Agency ID, Clinic ID, MCAs Due, MCAs Completed, MCAs Not Completed, % MCAs Completed, Not Completed/Issued Benefits, % Not Completed/Issued Benefits, 1 Set

Issued, 2 Sets Issued, 3 Sets Issued, 4 or More Sets Issued, MCAs with Scheduled Appts, MCA Appts Kept % MCA Appts Kept

Some uses include:

- Identify participants with MCAs, whether an appointment was scheduled/kept, who completed the MCA, the number of sets issued after the MCA Due (regardless of whether completed) and staff who issued the benefits.
- Identify the number of MCAs due during a specified time period.
- Determine the number and percentage of completed MCAs.
- Determine the number and percentage of MCA appointments, scheduled and kept, for the agency and its clinics.
- Identify staff who may be issuing benefits, and the number of sets, to participants after their MCA Due date who have not had their MCA completed.

ME Chart Audit

Revised 11.26.2018

Description: A list of participants issued benefits during a specified time period, for a specified participation month, and at a specified agency. The report includes a high-level overview of issuance and the participant's most recent certification.

Columns: Clinic ID, HHID, SWID, Benefit #, PPT Sig., Iss. Date, PPTN Mo., Void Date, WIC type, Cert Date, Certifier, ID Proof, Residency Proof, Phys. Pres., CPA Sig., RF 502, and Income information (Adjunctive Income and Proof of Income).

Some uses include:

- Assist regional consultants with chart review prior to MEs.
- Can be used by local agencies for their own audits/chart review.

New Households and whether Substance Abuse NE Topic and/or Material was Provided

Created 11.21.2018

Description: This report provides a list of new households with members certified at the specified agency during the specified time period and whether the "Dangers of Substance Abuse" Nutrition Education topic and/or the "Alcohol, Tobacco, and Other Drugs" material was documented in the Nutrition Education tab as having been provided to at least one member of the new household.

Columns (depending on tab): New Household, Date Household ID Assigned, Certification Date(s), Material Given, NE Topic Covered, and Staff Who Completed Cert.

Some uses include:

- Identify new households who received the required substance abuse information at their initial certification.
- Identify staff who may not be providing, or documenting, the substance abuse information to new households for further training.

Participants for Chart Audits

Created 4.12.21

Description: Provides an unduplicated list of participants certified during the specified time period and by specified agency, clinics and WIC Categories. This template replaces the HuBERT Participants for Chart Audit report (OPR051).

Columns: WIC Type, HHID, SWID, First Name, Last Name, Date of Birth, High Risk, and Certifying Staff Member.

Some uses include:

- Provides an unduplicated list of all participants certified during a specified time period by agency, clinic, and WIC Type for random auditing purposes.

Participants Not Issued Increased CVBs (by PFDTU)

Created 10/6/21

Description: Provides a list of participants who belong to the specified agency, were issued benefits with a Printed First Date to Use (PFDTU) during the specified time-period, and were issued benefits without an increased CVB of $24, $43, or $47. The report has an OPTIONAL input control that allows the user to filter the report output by Clinic ID.

Columns: Clinic ID, HHID, SWID, DOB, WIC Type, Staff ID (Issued by), Issued Date, PFDTU, CVB $ Amount, Cert End Date, Last Set's LDTU, Authorized Rep's Name, Telephone #, Lang., and Interp. Needed.

Some uses include: Identify participants who were issued benefits without the increased CVB amounts of $24, $43 or $47.

Participants Not Issued Increased CVBs by Issued Date

Created 10/5/22

Description: Provides a list of participants who belong to the specified agency and were issued benefits between 10/1/2022 and the specified date for the *Fresh or Frozen Fruits & Vegetables* default food item with an amount of $9, $11, or $17.50. The output displays any participants with a Printed First Date to Use (PFDTU) of the current date or in the past in bold red font. The report has an OPTIONAL input control that allows the user to filter the report output by Clinic ID.

Columns: Clinic ID, HHID, SWID, DOB, WIC Type, Staff ID (Issued by), Issued Date, PFDTU, CVB $ Amount, Cert End Date, Last Set's LDTU, Authorized Rep's Name, Telephone #, Lang., and Interp. Needed.

Some uses include:

- Identify participants issued benefits for the *Fresh or Frozen Fruits & Vegetables* default food item after 10/1/2022 when the increased CVB should have been issued.
- Identify staff who may require more training in correctly issuing increased CVBs.

Presumptive Eligibility & Documentation

Created 2.16.22

Description: A list of participants who were certified at the specified agency during the specified time period and for whom Presumptive Eligibility – 90 Days was selected as Proof of MHCP-MA or MHCP-MN Care.

- Tab 1 – PE List displays the date Presumptive Eligibility (PE) was selected for the MHCP income record and if another MA/MN Care income record was entered within 120 days of the Cert Start Date. It also includes the Staff ID of the user that created the PE income record and if benefits were issued after 6 months.
- Tab 2 – Notes, displays the PE/SOD-Income notes written within 7 days of the Cert Date and whether a follow-up note was written between 1 and 120 days after the cert.
- Tab 3 – Missing Notes, indicates if no PE/SOD-Income note was written and/or if no follow-up note was written and whether benefits were issued after 6 months.

The last tab provides a statewide count by agency of participants with PE selected who were certified during the specified time period.

Columns (depending on report tab): HHID, SWID, Staff Created PE Record, Cert Start Date, PE + Next Record(s), MA or MN Care, Income Proof, Benefits > 6 Months, Note Text, PE Date, Agency and Participant Count.

Some uses include:

- Audit PE records to ensure documentation is occurring correctly.
- Identify if benefits are being issued without documentation that supports further issuance.
- Identify potential needs for further training on PE and its documentation.
- Identify agencies within the state that had PE selected for participant income records.

Women with Unlinked or One-Way Linked Infants

Description: A list of currently certified women who belong to the specified agency and do not have a two-way link to their infant's record. Also provides the Staff ID of the person who completed the certification.

Columns: HHID, Mom's SWID, Type of Link, Current BF Amt, Actual Delivery Date, Cert Date, and Certifier.

Some uses include:

- Identify participants that need to have a two-way link created between mom and baby's record.
- Ensure the BF dyad is counted correctly in the participation count.
- Identify staff who may need further training in creating two-way links.

Agency Management – Due/Overdue

Due for Cert, MCA or Nutrition Visit

Revised 10.29.2018

Description: A list of participants due for certification, MCA or nutrition visit (benefit pick-up) during a specified time period who currently belong to the specified agency. The report output displays whether a participant has a future appointment scheduled and contact information.

Columns (depending on report tabs): HHID, SWID, First Name, Last Name, DOB, WIC Type, High Risk, Last Set's LDTU, Cert Start Date, MCA Due Date, Cert End Date, Appt Date, Appt Desc., Lang. (Int. Needed), Authorized Rep's Name, Telephone #, Comment 1, Clinic ID, Participant's Name, Address, City, State, and Zip Code.

Some uses include:

- Identify participants due for certs or MCAs who don't have an appointment scheduled.
- Create mailing labels for reminders about scheduled appointments or to schedule an appointment.
- Provides contact information for reminder calls/outreach.
- Provides language/interpreter needs for scheduled appointments.

Due for Nutrition Visit

Created 7.17.2019

Description: A list of participants who belong to the specified agency and clinic(s) who are due for a nutrition visit based on the last set's LDTU falling between the specified dates and who do NOT have an appointment scheduled within 30 days of their LDTU and are NOT due for recert or midcert. Participants are also excluded from the output if they have any household members that have an appointment scheduled or who are due for recert/midcert.

Columns: Clinic ID, HHID, SWID, Participant Name, WIC Type, Last Set's LDTU, Authorized Rep, Telephone # and Language

Some uses include:

- Obtain a list of "walk-in" participants to do reminder calls about nutrition visits.

Due, or One Month Overdue, for Certs or MCAs & Due for Nutrition Visit with Local Use Question #1

Revised 4/10/23

Description: A list of participants who currently belong to the specified agency and clinic(s). Participants are included in the Appointments output if due (during the specified time period) or overdue (due during the month previous to the specified time period) for a Certification or Mid-certification Assessment (MCA) and their last set's Last Date to Use (LDTU) falls within the specified time period. Participants are included in the Nutrition Visit (NV) tab if their last set's LDTU falls within the specified time period and neither they or any other members of their household are included in the Appointments tab. Participants are excluded from both outputs if they, or anyone in their household, has an appointment scheduled for today or any future date.

Columns: HHID, SWID, First Name, Last Name, DOB, WIC Type, Last Set's LDTU, Cert Start Date, MCA Due Date, MCA Date, Cert End Date, Language, Telephone #, Local Use Question #1, Comment 1, Telephone 2, Comment 2, Authorized Rep's Name, Mail Address, Mail City, Mail State and Mail Zip.

Some uses include:

- Provides contact information for reminder calls/text and outreach.

Overdue Certs

Revised 5.21.2020

Description: A list and count of infants, children and pregnant women who currently belong to the specified clinic(s) and are overdue for certification based on their Cert End Date falling between a specified date and the current date. The report displays the participants' most recent appointment date if in the past and excludes participants with a future appointment, children turning 5, and those terminated or determined ineligible for reasons that exclude them from eligibility for recertification. The output also provides a simple format that can be exported to Excel for easy sorting by columns; a count of participants by Cert End Date, WIC Type and Language (and count and percent of Interpreter Needed) by Clinic ID; a listing of participants and authorized reps for labels; and a listing of participants' contact information along with the value selected for Local Use Question #1. (Local Use Question #1 does not need to be used to use this report.)

Columns (depending on report tabs): Agency ID, Clinic ID, HHID, SWID, Participant's Name, Authorized Rep's Name, Language, Interpreter Needed, WIC Type, DOB, Cert End Date, Categ. Inelig. Date, Telephone 1, Telephone 2, Appt. Date, First Name, Last Name, Auth Rep FN, Auth Rep LN, Address, City, State, Zip Code and Local Use Question #1.

Some uses include:

- Identify participants overdue for certs who don't have an appointment scheduled.
- Contact overdue participants for reminder calls/outreach.
- Contact overdue participants based on information collected in Local Use Question #1.
- Create mailing labels for reminders/outreach.
- Ascertain number of participants needing appointments who speak another language and will require an interpreter.

Resource Management

Description: A list of participants who belong to the specified agencies who are due for MCAs, recerts and delivery, or becoming categorically ineligible for WIC during the specified time period. Includes a summary count of participants due by agency and clinic, agency and WIC Type, and clinic and WIC type

Columns (depending on report tab): SWID, WIC Type, Cert End Date, Agency ID, Clinic ID, MCA Due Date (tab 1 only), DOB (tab 2 only), EDD (tab 3 only), Categorical Ineligibility Date (tab 4 only).

Some uses include:

- Identify participants due for appointments or due to deliver.
- Help manage resources/staff by ascertaining number of appointments that will be required for a specified time period.
- Help manage caseload with count of participants who will no longer be eligible for the WIC program during a specified time period; determine number of new participants required to maintain current caseload.

Appointments

Appointments with Clinic Location

Created 2.24.2020

Description: A list of participants with appointments scheduled at the specified agency and clinic(s) during the specified time period. The output provides the city of the WIC clinic where the appointments are scheduled.

Columns: Telephone #, Participant Name, Appt Date, Appt Time and Clinic Location.

Some uses include:

- Output for texting outreach.

Appointments with Interpreter Needed

Revised 7.29.2019

Description: A list of participants who have the NEED INTERPRETER checkbox selected in Demographics and have an appointment scheduled at the specified agencies during a specified time period. The report also provides a count of participants who need interpreters by language and Clinic ID.

Columns: HHID, SWID, Participant Name, Appt Date, Appt Time, Appt Type, Resource, Int. Needed?, Language, Agency/Clinic ID.

Some uses include:

- Identify participants requiring specific staff or language services.
- Assess the number of appointments for a specified time period (day or week, etc.) that will require language services.
- Help to assess need for bilingual staffing.

Confirmed Appointments

Created 3.26.2018

Description: Provides a list and count of participants with appointments scheduled at the specified agency during the specified time period and whether their appointments were kept and/or confirmed. A count and percentage of the following are also provided: total, kept, not kept, confirmed, not confirmed, confirmed and kept, not confirmed and kept, confirmed and not kept, and not confirmed and not kept appointments. An OPTIONAL Input Control can be used to filter the report output by Clinic ID.

Columns: Total Appts, Kept Appts, Not Kept Appts, Confirmed Appts, Confirmed and Kept Appts, Not Confirmed and Kept, Confirmed and Not Kept Appts, Not Confirmed and Not Kept, Clinic ID, Appt Date, Appt Time, SWID, Appt Kept, Appt Confirmed, Confirmed Date, and Confirmed Comment.

Some uses include:

- Assess if confirming appointments impacts whether appointments are kept.
- Obtain a list of participants scheduled for appointments during a specified time period and whether the appointments were kept.
- Obtain a count and percentage of total, kept, not kept, confirmed, not confirmed, confirmed and kept, not confirmed and kept, confirmed and not kept and not kept and not kept appointments.

Count of Appointment Types

Description: Count of participants, with an appointment scheduled at the specified agencies during the specified time period, by appointment type and Clinic ID.

Some uses include:

- Assess staffing needs based on how many of a certain type of appointment are going to occur during a specified time period (ex: the number of high risk appointments, which may require an RD to be present, at a clinic on a specific date).
- Identify appointment types that are obsolete or no longer being used.

Daily Appointments

Revised 4.15.2020

Description: This report provides a list of participants with an appointment scheduled at the specified agency and clinic on the specified date; a count of appointment types by resource; a count of appointment types by the clinic where the participants currently belong; and a list by household that can be used to print labels. An OPTIONAL input control allows the report user to filter the output by Resource.

Columns (depending on report tabs): Agency (where appt scheduled), Clinic (where appt scheduled), Appt Date, Appt Time, SWID, Participant Name, Telephone 1 (Comment 1), Appt Type, Lang. (Interp. Needed), Clinic PPT Belongs To, HHID, DOB (WIC Type), Authorized Rep's Name, Resource, Currently High Risk, Authrepfirstname, Authreplastname, Mailaddress, Mailcity, Mailstate, and Mailzip.

Some uses include:

- Provide list scheduled appointment for reminders calls/outreach.
- Count the types of appointment by resource, scheduled at the specified clinic, and by the clinic where the participant currently belongs.
- Create labels for reminder letters by household and authorized rep.

Daily Appointments by Household ID with Local Use Question #1

Revised 10.16.2019 (Posted statewide 1.28.20)

Description: Provides a list of participants by Household ID with appointments scheduled on the specified date at the specified agency and clinic(s). The output includes selections from Local Use Questions (LUQ) 1; agency counts by resource and appointment type; and clinic counts by resource and appointment type.

Columns (depending on report tabs): Appt Type, Appt Date, Appt Time, Household ID, Telephone #, Local Use Question #1, Clinic (Name), and Resource.

Some uses include:

- Provide a list of households with scheduled appointments for outreach based on selections from Local Use Question #1.
- Counts of types of appointments by agency and clinic for a specified date.

Daily Appointments & Local Use #2

Created 4.11.2017

Description: A list of participants with an appointment scheduled at the specified agency and clinic on the specified date. This report output also lists the option selected from Local Use Question #2. It includes a count of appointment types by resource, a total count of appointments scheduled, and labels by household and the authorized representative.

Columns (depending on report tabs): Appt Time, SWID, HHID, First Name, Last Name, DOB, WIC Type, Telephone, Comment, Authorized Rep's Name, Appt Type, Resource, Interpreter Needed, Language, Currently High Risk, Local Use #2, Authrepfirstname, Authreplastname, Mailaddress, Mailcity, Mailstate, and Mailzip.

Some uses include:

- Provide a list of participants with scheduled appointments for reminder calls/outreach.
- Obtain a count of appointments scheduled, types of appointments and the count per resource.
- Create labels for reminder letters by household and authorized representative.

Daily Appointments – Simple Output

Created 5.26.22

Description: Provides a list of appointments for a specified date scheduled for a specified agency and clinics. The output has very few fields (phone, language, appointment date/time, participant name and clinic name). There are two tabs; one without Location/Clinic Name and one with the Location/Clinic Name column.

Columns (depending on report tabs): Phone, Language (only English and Spanish), Date, Time, Name, and Location (Clinic).

Some uses include:

- Developed for an agency using the Prevention Pays texting service.

Daily Appointments with Last Hgb Record

Created 4.8.2018

Description: A list of participants with an appointment scheduled at the specified agency and clinic on a specified date. The output provides the last hemoglobin record, including the date and the hemoglobin value or if an Exception Reason was selected (CPA Determined Not Due for Bloodwork). It also provides a count of appointments scheduled by resource, household labels, and a list of households with more than one member scheduled for an appointment on the specified date.

Columns (depending on report tabs): Appt Time, SWID, First Name, Last Name, Telephone, Currently High Risk, Appt Type, Interpreter Needed, Date of Most Recent Hgb, Hgb, HHID, DOB, WIC Type, Authorized Rep's Name, Resource, Language 1, Exception Reason, Mailaddress, Mailcity, Mailstate, and Mailzip.

Some uses include:

- Provide a list for reminder calls.
- Obtain a count of types of appointments scheduled and the number of appointments scheduled for a resource.
- A total count of scheduled appointments for a specific date and clinic.
- Create labels for reminder letters by household and authorized rep.
- Ascertain which participants require a hemoglobin check at the scheduled appointment.

Daily Appointments with PMI Number

Revised 8/19/22

Description: A list of participants who have an appointment scheduled at the specified agency on the specified date. The output includes the PMI #, Date of Birth and Appointment Type for verifying MA to help meet the Separation of Duties requirements. Two OPTIONAL Input Controls are used to filter the report output by clinic and by appointment type. Note that page breaks occur by clinic.

Columns: Clinic ID, Appt Time, HHID, SWID, PMI #, DOB, First Name, Last Name, Appt Type, Telephone 1, Comment 1, Telephone 2, Comment 2, Need Int?, Language, Auth Rep First Name, and Auth Rep Last Name.

Some uses include:

- Obtain a list of participants who have an appointment on a specific date to assist with verifying MA and to help meet the Separation of Duties requirements.

Infants & Children with Future Appointments Who Have Not Picked Up

Description: A list of currently certified infants and children who have an appointment scheduled at the specified agency and clinics during a specified **future** time period and have missed nutrition visits based on their last set's Last Date to Use (LDTU) being before the first date of the current month.

Columns: HHID, SWID, Last Set LDTU, Appt Date, Appt Time, Termination Date, Cert End Date, Appt Requested Date, WIC Type, Participant's Name, Authorized Representative's Name, and Telephone #.

Some uses include:

- Follow-up with participants who are eligible to pick-up benefits before their next scheduled appointment.
- Delete future scheduled appointments for participants when it has been determined that they aren't returning to WIC.

Kept Appointments Listing

Created 11.3.2020

Description: A list of participants that kept an appointment scheduled at the specified agency during the specified time period.

Columns: HHID, SWID, Language, Telephone #, Email Address and Local Use #1

Some uses include:

- Outreach - list for participant satisfaction survey

Kept vs. Missed Appointments

Revised 1/4/2023

Description: Provides the number of kept/missed appointments, kept/missed confirmed appointments, and the percentage kept and confirmed kept during the specified time period for the specified agency and its clinics. This template replaces the HuBERT report Kept vs. Missed Appointments (CLD019).

Columns (depending on the report tab): Appointment Type, Language, Race/Ethnicity, Agency, Clinic, Kept, Missed, Kept %, Confirmed Kept, Confirmed Missed, Confirmed Kept %.

Some uses include:

- Assess no show rates for agency and clinics by Appointment Type, Language and Race Ethnicity.
- Assess effectiveness of confirming appointments.
- Assess now show rates by specific Appointment Types for Agency, Clinics, Language and Race Ethnicity.

Missed Appointments

Revised 4.12.2021

Description: A list of participants who missed an appointment scheduled at the specified agency and clinic(s) during the specified time period. The output displays: the next appointment scheduled; a count, average and percentage of missed appointments by date for the specified clinic(s); and household and participant labels.

Columns (depending on report tab): Appt Date, Appt Time, Appt Type, HHID, SWID, Next Appt, Participant's Name, WIC Type, Authorized Rep's Name, Telephone #, Comment 1, Lang., Resource, Clinic, Auth. Rep's First Name, Auth. Rep's Last Name, Mail Address, Mail City, Mail State, Mail Zip Code, Participant's First Name, and Participant's Last Name.

Some uses include:

- Identify and contact participants who have missed an appointment and don’t have another appointment scheduled.
- Ascertain count and percentage of missed appointments by date and clinic.
- Assess whether meeting goals for no-show rates.
- Assess outreach effectiveness (reminder calls, One-Call messaging, etc.).
- Create labels for participants or households with missed appointments.

Missed Appointments by AM and PM 15-Minute Time Blocks

Created 11.26.2018

Description: Provides a list of participants who missed an appointment scheduled at the specified agency and clinic(s) during the specified time period. The output also provides a count and percentage of missed appointments by date and Clinic ID. Tabs 1 and 2 are similar to the MISSED APPOINTMENTS report template except that it does not display the next appointment scheduled. Tabs 3 and 4 divide the specified days into the number of 15-minute time blocks that have resources and appointments scheduled. A percentage of missed appointments is then based on the number of 15-minute time blocks with actual appointments scheduled. Tab 3 divides the days into AM (appointments starting before 12:30PM) and PM (appointments starting at or after 12:30PM). Tab 4 divides the days into AM (appointments starting before 11:15AM), Lunch (appointments starting at 11:15 up until 12:45PM), PM (appointments starting at 12:45 up until 4:00PM), and Late (appointments starting at or after 4:00PM).

Columns: Appt Date, Appt Time, Appt Type, HHID, SWID, Participant's Name, WIC Type, Authorized Rep's Name, Telephone #, Language, Resource Clinic, Total by Clinic, Average Missed, Total Missed, % Missed, Total Appts, # of 15-Min Time Blocks w/Resources Scheduled, # of 15-Min Time Block with Appts Scheduled, % of 15-Min Time Blocks with Appts Scheduled, # of Missed Appts, and % Missed Appts Based on 15-Min Time Blocks with Scheduled Appts.

Some uses include:

- Identify and contact participants who have missed an appointment
- Ascertain count, average and percentage of missed appointments by date and clinic, and based on scheduled 15-minute time blocks.
- Identify time periods that may have more missed appointments.
- Assess whether meeting goals for no-show rates.
- Assess outreach effectiveness (reminder calls, One-Call messaging, etc.)
- Obtain percentage of resource availability columns that have scheduled appointments.

Missed Appointments Follow-up by Appointment Type

Revised 3.8.2017

Description: A list and count of participants, based on the Appointment Type ID (Tab 1 provides a reference of Appt Type IDs and Appointment Types), who have missed appointments scheduled at the specified agency during the specified time period. The report output utilizes the Missed Appointment Follow-up function, found under Participant Activities in the MIS and indicates whether a Missed Follow-up contact was completed, the date of completion and the follow-up comment (if available). It also provides a count of missed appointments by WIC Type, for the agency and its clinic, and the number and percentage of completed Missed Appointment Follow-up contacts.

Columns (depending on report tab): Appt Type ID, Appt Description, Appt Date, HHID, SWID, First Name, Last Name, WIC Type, FU Completed?, FU Date? FU Comment, WIC Type, Missed Appointments at Agency, Missed Appointments at Clinic, and Follow-up Completed.

Some uses include:

- Obtain the number of missed appointments for participants scheduled for specific types of appointments during a specified time period.
- Identify participants with and without a completed Missed Appointment Follow-up contact.
- Audit whether Missed Appointment Follow-up contacts are being completed for participants with specified types of appointments (ex: New Pregnant).

Missed Appointments Follow-up by Current WIC Type

Created 12.1.2016 (revised title 2.21.2017)

Description: A list and count of participants, based on their **current** WIC Type, who have missed appointments scheduled at the specified agency during the specified time period. The report output utilizes the Missed Appointment Follow-up function, found under Participant Activities in the MIS, and indicates whether a Missed Follow-up contact was completed, the date of completion and the follow-up comment (if available). It also provides a count of missed appointments by WIC Type, for the agency and its clinic, and the number and percentage of completed Missed Appointment Follow-up contacts.

Columns (depending on report tab): Appt Date, HHID, SWID, First Name, Last Name, WIC Type, Appt Description, FU Completed?, FU Date? FU Comment, WIC Type, Missed Appointments at Agency, Missed Appointments at Clinic, and Follow-up Completed.

Some uses include:

- Obtain the number of missed appointments for a specific WIC type during a specified time period.
- Identify participants with and without a completed Missed Appointment Follow-up contact.
- Audit whether Missed Appointment Follow-up contacts are being completed for specific WIC types

No Shows by Agency for Specified Time Period

Revised 5.8.2019

Description: Provides a count and percentage of appointment no shows per agency and for the state during the specified time period. An optional Input Control allows the output to be filtered by specific agencies.

Columns/Rows: Total Appts, No Shows, % No Shows, MINNESOTA WIC, and Agency.

Some uses include:

- Assess and compare no-show rates between agencies and to the State..
- Assess no-show rates for agencies in a certain region or CHB.

No Shows by Day and Time

Revised 7/21/2022

Description: Provides a count and percentage of appointment no shows by day of week, hour of day, appointment times, and appointment date. This report has two OPTIONAL input controls, which allow the user to filter the output by Clinic and/or Appointment Type ID. The Appt Reference tab provides a list of agency-specific Appointment Type IDs and the Appointment Descriptions.

Columns (depending on report tabs): Appointment Type ID, Appointment Description, Total Appts, No Shows, Percentage of No Shows, Totals, Day of Week, Hour of Day, Appt Time, and Appt Date.

Some uses include:

- Assess no-show rates by date, week-day, hour, and appointment times.
- Identify days or times that have the lowest or highest no-show rates.
- Compare no-show rates between clinics.

Participants by Scheduled Appointment Type(s)

Created 6.22.2017

Description: A list and count of participants with appointments scheduled at the specified agency during the specified time period by appointment type. An optional Input Control allows the report user to limit the output to specific appointment types.

Columns: Appointment Type, Clinic, HHID, SWID, Appt Date, Appt Time, Participant, DOB, Age, Authorized Rep, Telephone #, Address (mail), City, State, and Zip.

Some uses include:

- Obtain a list of participants scheduled for a specific type of appointment for outreach.

- Assist with coordination of a certain type of appointments with other assistance programs (ex: first time pregnant women with PHN visit).

Scheduled Appointments

Revised 7.20.2021

Description: A household and participant list of appointments scheduled at the specified agency during the specified time period. This report has an OPTIONAL Input Control to filter the output by Clinic ID.

Columns (depending on report tab): Appt Date, HHID, Authorized Rep, Telephone #, Comment, Address, City, State, Zip Code, Clinic ID, Appt Time, Appt Type, Email Address, and State WIC ID

Some uses include:

- Obtain contact list for households or participants with appointments scheduled for outreach/texting.
- Create labels or emails for outreach, etc.

Staff Who Scheduled Appointments

Revised 10.29.2018

Description: This provides two different sets of lists and counts of appointments scheduled by staff: one set is based on **the date the appointments were created** by the staff person; the other is based on **the date the appointments were scheduled for**.

Columns (depending on report tab): Staff Name, Staff ID, Date Appt Created, Time Appt Created, SWID, Cert Due Date, Appt Description, Appt Duration, Clinic ID, Total Appts Scheduled per Day, Total Appts Scheduled by Staff Person, Appt Date, Appt Created by, User ID, and Created Date

Some uses include:

- Identify staff who scheduled specific appointments.
- Obtain count of appointments scheduled for a specific date.
- Obtain a list of appointments scheduled for a specific date.

Two or More Missed Appointments

Description: A list of participants who currently belong to the specified agency and have missed two or more appointments in the last 90 days. Also provides the number of missed appointments by State WIC ID.

Columns: HHID, SWID, WIC Type, Certification Dates, Missed Appointments (Date and Time in Military Time), and Clinic ID.

Some uses include:

- Identify participants who may have a greater need for reminder call or direct contact from WIC representative.
- Identify participants who may have greater difficulty getting to clinic (transportation issues, not on bus line, etc.)

Unfilled Appointment Blocks

Revised 1.3.2018

Description: Provides information about appointments scheduled at the specified agency during the specified time period based on 30, 20 and 15-minute "time-blocks" for appointments. The report output includes the number of scheduled resources, the number of allotted time-blocks, the count and percentage of time-blocks with scheduled appointments and the count and percentage of the unfilled time-blocks for each date. Depending on the report tab, the output is grouped by Resource and Clinic ID or Clinic ID and the average number of allotted, scheduled and unscheduled time blocks is provided for each resource and/or clinic. The output also provides an agency summary by resource and clinic.

Columns (depending on report tab): Resource, Clinic, Date, Day, Allotted 30-Minute Time Blocks, Scheduled 30-Minute Time Blocks, Unscheduled 30-Minutes Time Blocks, Resource Name, Number of Scheduled Resources, and Agency Total.

Some uses include:

- Identify days/clinics that tend to have multiple unfilled appointment blocks.
- Assess staffing for appointments.

Benefits

Count of Benefits Redeemed in Following Fiscal Year

Revised 12.13.2017

Description: Counts the number of benefits that were issued for a federal fiscal year (FFY) and subsequently redeemed the following FFY along with the total paid amount of the redemption.

Columns (depending on tab): Paid Date, Count of Benefits Redeemed, Total Paid Amount, and Issued Date.

Some uses include:

- Developed for State Finance.
- Could be used to ascertain the number of benefits that were issued during a specified time period and redeemed after a specified date.

Missed Nutrition Visits

Description: A list of participants who belong to the specified agency and clinic(s) who are eligible to receive benefits and who have missed a nutrition visit/benefit pick-up based on their last set's LDTU being during a specified time period. The report provides the last appointment scheduled, which could be in the past or future, and excludes those not eligible for issuance. Labels can also be created for the household or by participant.

Columns (depending on report tabs): HHID, SWID, Last Set's LDTU, Next Appt, Participant's Name, Authorized Rep's Name, Telephone #, MCA Due Date, Cert End Date, WIC Type, DOB, Language, Interpreter, Clinic ID, Mailing Address, City, State and Zip Code.

Some uses include:

- Help improve caseload by identifying participants overdue to pick-up benefits for reminder calls/outreach.
- Create mailing labels for outreach.

Missed Nutrition Visits by Last Clinic Issued

Description: A list of participants whose last set of benefits were issued at the specified agency and clinic(s) who are eligible to receive benefits and who have missed a nutrition visit/benefit pick-up based on their last set's LDTU being during a specified time period. The report provides the last appointment scheduled, which could be in the past or future, and excludes those not eligible for issuance. Labels can also be created for the household or by participant.

Columns (depending on report tabs): HHID, SWID, Last Set's LDTU, Next Appt, Participant's Name, Authorized Rep's Name, Telephone #, MCA Due Date, Cert End Date, WIC Type, DOB, Language, Interpreter, Clinic ID, Mailing Address, City, State and Zip Code.

Some uses include:

- Developed to assist agencies that schedule appointments at a central site and transfer participants when doing so.
- Help improve caseload by identifying participants overdue to pick-up benefits for reminder calls/outreach.
- Create mailing labels for outreach.

Benefits – Agency Management

Count of Participants & Households Issued Benefits by Date & Time

Revised 12.15.2020

Description: Provides a count of participants and households issued benefits at the specified agency and clinic(s) during the specified time period. Counts are broken down by agency/clinic, date, and morning/afternoon. The morning and afternoon are based on 30-minute increments:

morning = 7:00AM – 12:30PM; afternoon = 1:00PM – 11:30PM. Counts are also broken down by when benefits were issued: All = benefits issued at nutrition visits (NV), certification and/or Mid-certification Assessment (MCA); NV only = benefits issued at Nutrition Visit only.

Some uses include:

- Assess potential activity-level trends in days/times.
- Assist with staffing or establishing clinic days/times availability based on when participants pick-up benefits.

Count of Participants & Households Issued Benefits by Week, Day & Date

Revised 4.7.2016

Description: Count of participants and households issued benefits at the specified agency and clinic(s) during the specified time period based on the week in the year, day and date. Counts are based on full weeks (not WIC weeks) and provided based on all benefit issuance (issued at nutrition visit, cert or MCA) and benefit issuance occurring at nutrition visits only.

Some uses include:

- Assess potential activity-level trends in weeks/days.
- Assist with staffing or establishing clinic weeks/days availability based on when participants pick-up benefits.
- Identify uneven caseload distribution during months (ex: 1st week much heavier than 2nd, 3rd or 4th).

Issued More than One Benefit Set Pending ID/Residency Proof

Revised 4.18.2016

Description: A list of participants, certified during the specified time period at the specified agency, who had either PENDING PROOF or OTHER-WRITE NOTE selected for their ID Proof or Residency Proof when a second month of benefits was issued. The report identifies both the staff who certified the participant and the staff who issued the subsequent set(s) of benefits.

Columns (depending on report tabs): HHID, SWID, Clinic Where Certified, Certifier, CPA Signature?, Cert Start Date, Proof of Identity (tab 1), Proof of Residency (tab 2), Staff Issued Subsequent Set, Date of Subsequent Issuance, and FDTU of Subsequent Sets

Some uses include:

- Identify participants issued more than the one Federally-allowed month of benefits without proof of ID or residency.
- Identify staff who incorrectly issued benefits without first obtaining the appropriate proof of ID or residency and may require further training.

Lost & Stolen Benefits

Description: A list of participants who belong to the specified agency and have benefits marked as lost/stolen during a specified time period. The report also indicates whether the benefits were redeemed and provides a count of redeemed lost/stolen benefits by Staff ID.

Columns: HHID, SWID, First Name, Last Name, Benefit #, Reported Lost Date, Reported Stolen Date, Staff ID, Date Redeemed, and Redemption Amount

Some uses include:

- Identify lost/stolen benefits subsequently redeemed.
- Identify participants who may require reminder that benefits reported as lost/stolen should not be redeemed.
- Identify staff who may need further training about how to inform participants that lost/stolen benefits should not be redeemed.

More than One Set of Benefits Issued for Participation Month

Description: A list and count of participants who received more than one set of benefits for a specified participation month at a specified agency (excludes syncing sets and sets in which all benefits were voided).

Columns (depending on report tabs): SWID, Issued Date, PFDTU, LDTU, Issued By, Cycle Adjusted?, # of Benefit Sets, Voided Date, Voided By, Paid Date, Food Item Quantities and Description on Benefit.

Some uses include:

- Identify participants who incorrectly received more than one set of benefits for a participation month.
- Identify staff who may have incorrectly issued more than one set.
- Identify potential MIS issue with benefit issuance.

Participants Not Issued Benefits on Date of WIC Contact

Created 3.24.2020

Description: A list of participants who belong to the specified agency who had a WIC Contact (Cert, MCA, or documented Nutrition Education Contact or documented Note) on the specified date and were not issued benefits on **that date.**

Columns: HHID, SWID, Most Recent Cert Date, Most Recent MCA Date, Most Recent NE Contact Date, Most Recent Note Date, Last Set's LDTU, Authorized Rep's Name, and Telephone #.

Some uses include:

- Identify participants who were not issued benefits on the same date as a WIC contact (and were potentially missed being issued benefits for the current month).

Benefits – Cash-Value Benefits (CVBs)

Monthly Cash-Value Benefit Redemption

Revised 5.19.21 (to include 35 Dollar – Fruits and Vegetables)

Previously titled: Fruits & Vegetables Redemption Activity

Description: Monthly statewide count of paper and eWIC issuance and redemption of cash-value benefits for FRESH and FROZEN fruits and vegetables by household. A count and percentage is provided for each agency by participation month and includes the number of households issued CVBs, those with 100% redemption, those with partial redemption (including less than 50%, 50% or more, 75% or more, 85% and more), and those with no redemption.

Columns: Households Issued CVBs, Households with 100% Redemption of CVBs, Households with Partial Redemption of CVBs, Households with Less than 50% Partial Redemption, Household with 50% or More Partial Redemption, Households with 75% or More Partial Redemption, Households with 85% or More Partial Redemption and Households with No Redemption of CVBs.

Some uses include:

- Assess and compare redemption of CVBs to other agencies or the statewide total.
- Assess paper versus eWIC CVB Redemption

Monthly Cash-Value Benefit Redemption for Households at a Specified Agency

Revised 5.19.21 (to include 35 Dollar – Fruits and Vegetables)

Description: A list of households issued Cash-Value Benefits (CVBs) for FRESH and FROZEN fruits and vegetables by a specified agency for the specified participation month. The report output provides the amount issued to the household, redeemed by the household and the redemption percentage, as well as totals for the agency. This information can be run for both paper and eWIC benefit issuance/redemption. A count tab also provides the number of households issued CVBs, those with 100% redemption, those with partial redemption (including less than 50%, 50% or more, 75% or more, 85% and more), and those with no redemption.

Columns (depending on tab): HHID, CVB Amount Issued, CVB Amount Redeemed, Percentage Redeemed, Households Issued CVBs, Households with 100% Redemption of CVBs, Households with Partial Redemption of CVBs, Households with Less than 50% Partial Redemption, Household with 50% or More Partial Redemption, Households with 75% or More Partial Redemption, Households with 85% or More Partial Redemption and Households with No Redemption of CVBs.

Some uses include:

- Identify households who aren't redeeming CVBs for outreach/education.

- Assess change in redemption based on action to improve.
- Obtain issuance and redemption counts for households.

Statewide Count of Eligible Infants Not Issued CVBs

Revised 4.11.2016

Description: A snapshot of infants who are 9 to 12 months old as of the current date and have received a set of benefits with a Printed First Date to Use (PFDTU) between 9 and 10 months of age. The report provides a statewide count of infants eligible to receive fruit and vegetable cash-value benefits (CVBs) by agency; a count of these same infants who were NOT issued CVBs; and the percentage of eligible infants who did NOT receive CVBs.

Some uses include:

- Assess percentage of infants eligible to receive CVBs and compare percentage to statewide and other agencies.
- Identify agencies that may need to increase focus on infant use of fresh fruits/vegetables.

Benefits – Issuance

Benefits Issued by PFDTU

Created 7.28.2020

Description: A list of households, and counts of participants and households by WIC Week and WIC Weekday, issued benefits based on the Printed First Date to Use (PFDTU) by specified agency and time period. Tab 1 is a list of households; Tab 2 is a count and percentage by WIC Week by agency and clinic; and Tab 3 is a count by WIC Weekday by agency.

Columns (depending on report tab): HHID, PFDTU, WIC Week, WIC Weekday, Cert End Date, Clinic ID, Count by WIC Week, and Count by WIC Weekday

Some uses include:

- Identify uneven caseload distribution based on WIC Weeks and Weekdays.

Benefits Issued on Date at Clinic

Description: A list of participants and the benefits issued to them at the specified clinic on the specified date.

Columns: Issued Date & Time, SWID, WIC Type, Benefit Numbers, Issued by Staff, Void Date

Some uses include:

- Identify participants or benefits based on date/time and staff person who issued them (ex: when printer issues occur).

Direct Shipped Formula

Revised 11.28.2017

Description: Provides a list of participants issued direct-shipped formula at the specified agency during the specified time period. Two OPTIONAL input controls allow the user to limit the report output to Medical or Contract formula and to specific clinics. The default is to run the report for, and display, both formula types and all clinics.

Columns: Clinic ID, State WIC ID, Issued Date, Printed FDTU, Quantity, Formula, Staff Issued, and Ship To.

Some uses include:

- Manage medical formula inventory
- Ensure staff are performing Direct Ship correctly by selecting In Stock when issuing

Infants & Children Issued Benefits for the Specified Participation Month by Age

Created 11.7.2016

Description: A list and counts of infants and children issued benefits by the specified agency for the specified participation month. The participant lists are broken into 6-month age categories (0-5 Months, 6-12, 13-18, 19-24, 25-30. 31-36. 37-42, 43-48, 49-54, 55-60), grouped by clinic, and contain general demographic information including authorized reps and addresses that can be used to create labels. The counts are provided for the agency and for each clinic by month, 6-month age categories and year categories (0 -1 year, > 1 – 2, > 2 – 3, > 3 – 4, > 4 -5). Ages are calculated based on the difference between their date of birth and the first date of the specified participation month.

Columns (depending on report tab): Clinic, HHID, SWID, First Name, Last Name, Gender, DOB, Age (in Months), WIC Type, Race/Ethnicity or Cultural Identity, Cert End Date, Authorized Rep's Name, Telephone, Mail Address, Mail City, Mail State, Mail Zip Code, Clinic ID, Agency ID, Count by Age in Months, Count by Age in 6 Month Increments, Count by Age in Years, Agency Total, Agency Total by Clinic, Count by Age in Months by Clinic, Count by Age in 6 Month Increments by Clinic, Count by Age in Year by Clinic.

Some uses include:

- Obtain a list of infants/children issued benefits for a specific participation month by age for outreach/education/audits, etc. by clinic.
- Obtain a count of infants issued benefits for a specific participation month by clinic and age.
- Create labels for infants/children issued benefits by clinic and age.
- Provide information for Hunger Impact Grant Application.

Infants by Age Issued Benefits for Specified Participation Month

Revised 6.14.2017

Description: This report was created due to a request from the Farmers' Market (FM) organization to help track FM issuance. It provides a list and count of infants, by age in months, issued benefits for the specified participation month by the specified agency. Infants are listed by their age as of the Printed First Date to Use (PFDTU) of the set issued. An *optional* input control allows the report user to filter the report outputs based on the infant's age in months.

Columns: SWID, DOB, Printed FDTU, and Age in Months.

Some uses include:

- Obtain a list of infants issued benefits for a specified participation month by age.
- Help track FM voucher issuance for the FM organization.

Participants Issued Benefits

Revised 4.2.2020

Description: A list and count of participants, based on specified WIC Type, issued benefits at the specified agencies during the specified time period. An OPTIONAL input control allows the user to filter the report output by Clinic

Columns: Clinic ID, HHID, SWID, Issue Date, Issued Time, First Name, Last Name, WIC Type, DOB, F/M, Lang., Interp., Telephone #, Authorized Rep's Name, Address (Mail), City, State, Zip Code, and Race/Ethnicity.

Some uses include:

- Identify participants issued benefits on specific dates, or a certain time on those dates, and contact if necessary.

Participants Issued Benefits by PFDTU with Average Benefit Redemption Amount

Revised 4.28.2021

Description: List of participants issued benefits by the specified agency with a Printed First Date to Use (PFDTU) during the specified time period. The output displays a general benefit redemption amount based on foods typically issued by WIC Type, Breastfeeding Amount and Age Category. This is a static amount based on the default food packages issued in April 2021 and the Information System's average shelf prices for January-March 2021 (an average of all prices for an individual food item) and 100% redemption of the food package. The values are just estimates as there can be varying options selected for many of these food packages and food categories have an array of costs for different items a participant can select.

Columns: WID, WIC Type, Age, Race, Ethnicity, Gender, Address, City, State, Zip Code and Ave. Ben. Amt.

Some uses include:

- Obtain a list of participants issued benefits for grants, workgroup requests, etc.

Participants Issued Benefits by Staff ID

Revised 9.1.2016

Description: A list of participants, grouped by Staff ID, issued benefits at the specified agencies during the specified time period. Participants are only included if issued benefits at a nutrition visit; participants are excluded if issued benefits on the same date as a cert or MCA was completed. Also provides a count of households, participants, and benefits issued by staff and for the agency.

Columns (depending on report tab): Agency Name, Agency ID, Date Benefits Issued, HHID, SWID, DOB, WIC Type at Issuance, Currently High Risk, Most Recent Cert Date, Most Recent MCA Date, Clinic ID, Staff ID, Staff Name, Count of Participants Issued Benefits by Staff, and Count of Benefits Issued by Staff.

Some uses include:

- Identify participants issued benefits by a specific staff person on a specific date.
- Obtain count of participants and households served at nutrition visits (pick-ups) by staff and for the agency.
- Identify High Risk status of participants issued benefits for follow-up or documentation audit.

Benefits - Mailed Benefits

Mailed Benefits

Revised 4.4.2016

Description: A list and count of participants who were mailed benefits issued by the specified agencies during the specified time period. The report output provides both the date and time the mailed benefits were issued along with the Staff ID of the person who issued them.

Columns: Clinic ID, Staff ID, HHID, SWID, WIC Type, Issued Date, Issued Time, PFDTU, LDTU PPTN Date, and Mailed?

Some uses include:

- Identify participants mailed benefits.
- Count total number of participants mailed benefits during specified time period.
- Identify staff who are mailing benefits.
- Ascertain dates and times when mailed benefits were issued.

Mailed Benefits: Counted, Replaced & Redeemed

Description: This report output includes the following:

- a list of participants who were mailed benefits issued by the specified agency for the specified participation month;
- a count of participants who were mailed benefits by Clinic ID and whether the benefits were counted for the specified participation month;
- a count of the voided mailed benefits and whether they were counted for the specified participation month and a list of these participants;
- a list and total count of participants whose voided mailed benefits were replaced;
- redemption information for each mailed benefit; and
- total redemption for each participant mailed benefits.

Columns (depending on report tabs): HHID, SWID, PFDTU, Issued by Staff, Mailed, Counted, Void Date, Voided by Staff, Void Reason, Replacement, Replacement Mailed, Benefit #, Paid Date, Paid Amount, and Total Amount Redeemed.

Some uses include:

- Identify and count participants mailed benefits for a specific participation month.
- Ascertain whether the mailed benefits were counted for the participation month.
- Ascertain the number of mailed benefits subsequently voided and whether the participant was counted for the participation month.
- Identify mailed benefits that were voided and then replaced.
- Ascertain whether mailed benefits were redeemed.

Mailed Two or More Consecutive Sets

Description: A list of participants mailed two or more consecutive sets of benefits issued by the specified agency during the specified time period. The report also provides a total count of participants mailed two or more consecutive sets and the number of consecutive sets by participant.

Columns: HHID, SWID, WIC type, High Risk, PPTN Mo., Issue Date, Mailed, Paid Date(s), Staff ID, Agency ID and Clinic ID.

Some uses include:

- Ensure policy is being followed in regards to mailed benefits.
- Ascertain whether more than one set of benefits is being mailed to participants.
- Identify participants who have received consecutive sets of mailed benefits to audit/review charts.
- Identify staff mailing more than set of benefits.

Breastfeeding

Also see Participants/Breastfeeding Women

BF Stopped Reasons

Description: A list of infants that were **ever breastfed** and have a Breastfeeding Stopped Reason, who currently belong to the specified agencies, and **were born** during a specified time period. The report also provides a count and percentage by Breastfeeding Stopped Reason for the specified agencies and the state.

Columns: Agency ID, SWID, DOB, BF End Date, Age BF End, and Reason BF Stopped.

Some uses include:

- Compare percentage of BF Stopped Reasons between agency and state.
- Ascertain reason(s) most often selected for stopping breastfeeding.

Breastfeeding Infants by Participation Month(s)

Created 11.30.2020

Description: A list and count of infants by breastfeeding amount who were counted for the specified agency and participation months. OPTIONAL input controls allow the report to be filtered by Breastfeeding Amount and the Clinic.

Columns: BF Amt, Clinic (Counted), HHID, SWID, Participant Name, DOB, Cert Start, Cert End, Authorized Rep's Name, Telephone, and Agency/Clinic (Current).

Some uses include:

- Identifying participants for breastfeeding outreach.

Count of Infants Certified by BF Amount for State, Agency & Clinic

Created 5.1.2019

Description: A count and percentage of infants certified at the specified agency during the specified time period by breastfeeding amount. An optional Input Control allows the output to be filtered by the clinic where the infant was certified. Output also provides a count and percentage of infants certified by breastfeeding amount for the state by Agency.

Some uses include:

- Obtain number of infants certified at agency/clinic during a specified time period by breastfeeding amount.
- Obtain number of infants certified for the state or by agency during a specified time period by breastfeeding amount.

- Compare breastfeeding status of agency's infants to state percentages or other agencies' percentages.

Count of Issued BF Pumps & Supplies

Description: Count of participants who belong to the specified agency who were issued a breastpump/BF supply item during the specified time period. The report can be run for one specific item or for all items (the Item IDs are provided as a reference). A list of participants issued the items is also provided.

Columns: Item Description, SWID, Issued By, Date Issued and Clinic ID.

Some uses include:

- Help manage BF pump and BF supply item inventory.
- Ascertain number of specific items issued to participants.

In-Hospital Formula Feeding and Breastfeeding by Race and Cultural Identity

Created 10.28.2021

Description: Tables count infants who have an in-hospital feeding method (State Use Question #1) recorded. The first table looks at both race/ethnicity and cultural identity when categorizing participants and thus includes participants with either or both a specified race/ethnicity and specified cultural identity. The second table uses only race/ethnicity to categorize participants. The third table reports on only those participants with a reported cultural identity. An optional Input Control allows the output to be filtered by agency or clinic.

Columns: number with known feeding status, number breastfed (bf) exclusively, number Pasteurized Donor Human Milk (PDHM), percent exclusive or PDHM, number bf and In-Hospital Formula Fed (IHFF), percent bf and IHFF, number IHFF only, percent IHFF only.

Some uses include:

- Compare exclusive breastfeeding rates in various groups.
- Assess disparities in use of Pasteurized Donor Human Milk (PDHM) during the hospital stay.

Infants & Children Breastfeeding during Specified Time Period

Created 7.10.2019

Description: A list of infants and children who were "Ever Breastfed" and were breastfeeding at some point during the specified time period (based on having a breastfeeding history record created during the specified time period).

Columns: SWID, DOB, Current Age (months), Amt BF, BF End Date, Weeks BF, Infant/Child's Name, Auth Rep's Name, Address, City, State, Zip, and Telephone #.

Some uses include:

- Identify infants and children who were breastfeeding during a time period for outreach and congratulation messages. (The agency that requested this wanted a list of infants/children recently weaned and still breastfeeding to invite to a yearly dinner honoring breastfeeding families.)

Participants Issued BF Pumps & Supplies

Description: A list of participants who belong to the specified agency and have been issued BF pumps or BF supply items during a specified time period.

Columns: Participant's Name, SWID, Telephone #, Pump or Supply Issued, Issued By, Date Issued and Notes (blank column).

Some uses include:

- Help manage BF pump and BF supply item inventory.
- Obtain a list of participants who have received pumps/BF supply items and contact if necessary.

Breastfeeding – Peer Program

BF Peer Referrals

Description: A list of participants with a referral to the breastfeeding peer program during a specified time period. The type of referral (referral accepted, undecided or refused) can be specified

Columns: Agency ID, Clinic ID, referral type, Household ID, State WIC ID, referral date, expected delivery date, WIC type, parity, first name, last name, address, city, zip code, telephone #1, comment #1, telephone #2, comment #2, date of birth, race/ethnicity code, email address, referring staff ID.

Some uses include:

- Obtain contact information for participants undecided about enrolling in the peer program.
- Obtain a list of referrals refused by staff person offering the referral.

No Peer Assigned Referrals (NoPAR)

Description: This report produces three lists. The first is a list of referrals made during a specified time period. The second lists those referrals with a peer assigned. The third lists those participants who have been referred but have not yet been assigned a peer.

Columns (depending on report tabs): SWID, HHID, WIC status, referral date, Org ID, Create User ID, Date Assigned Peer, Referral Date, Agency, Site, Last Name, Date of Birth, and Due/Delivery Date

Some uses include:

- Check that participants referred to the peer program are assigned to a peer.
- Determine which staff are referring participants to the program.

Peer Active Client List

Description: A list of active clients currently being served by a specified peer counselor.

Columns: HHHID, term date, peer, client name, amount breastfeeding, due/delivery date, next appointment date, vouchers LDTU, telephones, comments, address, city, zip code, agency ID, service site ID.

Some uses include:

- Create a work list for each peer counselor of their active clients with current contact and other relevant information.

Peer Active and Closed Client List

Description: A list of all participants served by a specified peer counselor since a specified date.

Columns: SWID, HHID, contact date, adjusted contact type, create User ID, Bf Counselor ID, Bf Contact topic ID, WIC status, first name, last name, expected delivery date, actual delivery date, address, city, zip code, Telephone1, Comment1, Telephone2, Comment2, race/ethnicity, interpreter needed, language1, agency ID, service site ID.

Some uses include:

- Obtain a complete list of participants served by a specified peer counselor.

Peer Contact Type and Frequency Report

Description: A tabulation of the estimated number of contacts made by peer counselors during a specified time period, by type of contact. The report summarizes by peer program and by peer counselor.

Columns: counts of nonclient, face to face, telephone and text/email contacts by time of contact (prenatal, postpartum 0 – 3 months, postpartum 4 – 12 months).

Some uses include:

- Track program contacts made across time periods.
- Obtain patterns of contact by peer counselors (e.g. see which peer counselors are texting, which are successfully reaching clients prenatally, etc.).

Peer Contact Summary Form (for infants at 3 months and 12 months)

Description: A list of participants with infants born during a specified time period.

Columns: Peer, clinic ID, name, Household ID, State WIC ID, delivery date, blank spaces to record: date services began, contacts made (prenatal, PP birth to 12 weeks and PP13 weeks to closure telephone, text/email and face to face), date services ended/closure date.

Some uses include:

- Provide peer counselors with a form for reporting client contacts, with clients listed whose infants have reached 3 or 12 months of age.
- Blank lines are provided to report on clients who are closed before 3 or 12 months postpartum.

Spot Check Report

Description: A list of peer program clients who have or have not had a spot check completed during a specified time period.

Columns: Peer, HHID, name, amount breastfeeding, telephone numbers, due/delivery date, comments, most recent contact type, most recent contact date, service site ID, interpreter needed, notes/date called (blank).

Some uses include:

- Provide a list of active and recently completed clients to call for a spot check.
- Obtain a list of spot checks completed during a specified time period, for one or all peer counselors in a program.

Counts

Counts of New Participants

Created 12.8.2020

Description: Provides the following counts of new participants (participants with a Prescreen date within 30 days of their first Cert Start Date):

- Statewide count by Agency for Race Ethnicity, WIC Type.
- Agency count for specified agency by Cultural Identity, Zip Code (Residential).
- Clinic count for specified agency by Race Ethnicity, Cultural Identity, Zip Code (Residential) and WIC Type.

Some uses include:

- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity for the state.
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and agency.

Counts of Participants in a Certification by Race and Cultural Identity

Created 11.9.2021

Description: A count of participants who are, or were, in a certification period during the specified time period by WIC Type, Race and Cultural Identity. A count is provided by the specified agency and its clinics. A state total count is also provided by WIC Type and Race.

Some uses include:

- Obtain counts of participants enrolled during a specific time period for the state, by agency and by clinic
- To identify demographic shifts in participants being served by an agency/clinic.

Counts – Participation- Calendar Year

Calendar Year - Unduplicated Participation by Race Ethnicity

Created 1.29.2018

Description: An unduplicated participation count by Race/Ethnicity for a selected calendar year. Reports are provided based on the Agency and Grantee where the first set of benefits were issued in the selected calendar year and the CHB, City and County of residence where the participant currently resides. WIC type and breastfeeding status (if applicable) reflect the participant at the time of issuance.

Some uses include:

- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity for the state.
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and agency.
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and CHB of current residence.
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and city of current residence.
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and county of current residence
- Obtain an unduplicated participation count for a selected calendar year by Race/Ethnicity and grantee.

Calendar Year - Participation by Race Ethnicity Alone or In Combination (AOIC) with Other Races

Created 1.29.2018

Description: A participation count by Race/Ethnicity alone or in combination (AOIC) with other races for a selected calendar year. Reports are provided based on the Agency and Grantee where the first set of benefits were issued in a selected calendar year and the CHB, City and County of residence where the participant currently resides. WIC type and breastfeeding status (if applicable) reflect the participant at the time of issuance. AOIC counts include participants who report a single race along with those who report that race in combination with one or more of the race groups. Therefore, AOIC counts represent the maximum number of participants who reported as a race group. Agencies with larger numbers of individuals choosing more than one race category may find a more complete description of their population in the AOIC reports.

Some uses include:

- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC for the state.
- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC and agency.
- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC and CHB of current residence.
- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC and city of current residence.
- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC and county of current residence
- Obtain a participation count for a selected calendar year by Race/Ethnicity AOIC and grantee.

Calendar Year Unduplicated Participation by WIC Category

Created 1.29.2018

Description: An unduplicated participation count by WIC Category for a selected calendar year. Reports are provided based on the Agency and Grantee where the first set of benefits were issued in a selected calendar year and the CHB, City and County of residence where the participant currently resides. WIC type and breastfeeding status (if applicable) reflect the participant at the time of issuance.

Some uses include:

- Obtain an unduplicated participation count for a selected calendar year by WIC Category for the state.
- Obtain an unduplicated participation count for a selected calendar year by WIC Category and agency.
- Obtain an unduplicated participation count for a selected calendar year by WIC Category and CHB of current residence.

- Obtain an unduplicated participation count for a selected calendar year by WIC Category and city of current residence.
- Obtain an unduplicated participation count for a selected calendar year by WIC Category and county of current residence
- Obtain an unduplicated participation count for a selected calendar year by WIC Category and grantee.

Counts – Currently Certified

Count of Currently Certified Participants by City of Residence & Race Ethnicity – Agency & State

Created 4.14.2016

Description: A snapshot count, as of the report run date, of currently certified participants who belong to the specified agencies by their city of residence and race/ethnicity. The report also provides statewide totals by city and race/ethnicity.

Some uses include:

- Obtain a count of currently certified participants by city for participants who belong to the specified agencies.
- Obtain a count of currently certified participants by city for all cities in the state.
- Obtain a count of currently certified participants by city who are a certain race.
- Identify cities with lesser/greater concentrations of certain race/ethnicities.

Count of Currently Certified Participants by City of Residence & WIC Category/BF Amount – Agency & State

Created 4.14.2016

Description: A snapshot count, as of the report run date, of currently certified participants who belong to the specified agencies by their city of residence and WIC categories, including breastfeeding amount. The report also provides statewide totals by city and WIC categories/BF amount.

Some uses include:

- Obtain a count of currently certified participants by city for participants who belong to the specified agencies.
- Obtain a count of currently certified participants by city for all cities in the state.
- Obtain a count of currently certified participants by city by WIC category.
- Identify cities based on number of bf women vs. non-bf women.

Currently Certified by City of Residence

Description: This report provides two different types of counts for currently certified participants and households with at least one currently certified member. Counts are provided for all cities in which participants belonging to the specified agencies currently live and for any specified cities based on race/ethnicity, WIC type and the clinic where benefits were last issued.

Some uses include:

- Obtain a count of currently certified participants by city or specified city and race/ethnicity.
- Obtain a count of currently certified participants by city or specified city by WIC type.
- Obtain a count of households with at least one currently certified member by city or specified city.
- Obtain a count of participants issued their last set of benefits by clinic and city or specified city.

Statewide Count of Currently Certified Participants by Clinic, Agency, Grantee, and Zip Code, City & County of Residence

Revised 6.6.2016

Description: This report provides two different types of counts for currently certified participants and households with at least one currently certified member. Counts are provided for all cities in which participants belonging to the specified agencies currently live and for any specified cities based on race/ethnicity, WIC type and the clinic where benefits were last issued.

Some uses include:

- Obtain a count of all currently certified participants in the state by the Grantee, Agency or Clinic to which they currently belong.
- Obtain a count of all currently certified participants in the state by the Zip Code, City or County in which they currently reside.

Counts - Household

Count of Households by City of Residence – Agency & State

Created 4.18.2016

Description: This report provides a snapshot, as of the current date, of households with at least one currently certified member by their city of residence. It includes a count by city for the state and a count by city of households with members that belong to the specified agencies.

Some uses include:

- Obtain a count of households by city for any city in the state.

- Obtain a count of households for all cities in which household members who belong to the specified agencies live.

Count of New Households

Created 2.25.2019

Description: A count of new households by agency, clinic and statewide. The count is based on household IDs with a created date within 30 days of a member being certified at the specified agency (Tab 1-Agency) during the specified time period (Tabs 1 and 2).

Some uses include:

- Obtain a count of new households by agency, clinic and statewide.
- Help ascertain number of WIC Cards or amount of materials for new households to order.

Count of Participants & Households by Clinic

Description: This report provides two different counts by clinic for participants/households that belong to the specified agency; a count of all and a count of currently certified.

Some uses include:

- Obtain a count of participants that are currently assigned to a specific agency by clinic.
- Obtain a count of households with at least one member who is currently assigned to a specific agency by clinic.
- Obtain a count of currently certified participants assigned to a specific agency by clinic.
- Obtain a count of households with at least one currently certified member who is assigned to a specific agency by clinic.

Count of Participants & Households for Specified Zip Codes & Participation Months by Agency & County

Description: Count of participants and households that received at least one set of benefits during the specified participation month(s) and currently live in the specified zip code(s). The counts provided are by the agency where the participants and members of the households currently belong and zip code; and by the county where the participants and households currently reside and zip code.

Some uses include:

- Ascertain number of participants/households living in a specific zip code.
- Assess participant concentration in areas for sites.

Monthly Household Participation by State, Agency & Clinic with Somali/Spanish Counts

Revised 1.16.19 – Previously titled: Monthly Household Participation by State, Agency & Clinic

Description: A count of households with at least one member counted for the specified participation month. The output includes a count of households by statewide, agency, and specified agency and its clinics. It also provides a count by agency of participants with Spanish or Somali selected for Language 1 and the number with interpreter needed. (NOTE: This report is based on End-of-month having been completed for the specified participation month.)

Some uses include:

- Obtain household participation count for state, agency and clinics.
- Use counts to ascertain number of new outreach materials to order.
- Use counts to ascertain number of Somali or Spanish materials to order.

Statewide Undup CY Household Participation by Clinic, Agency, Grantee and Zip Code, City & County of Residence

Created 5.10.16

Description: An unduplicated calendar year participation count of households for the state, clinics, agencies, grantees, and zip codes, cities and counties of residence. (NOTE: This report is based on End-of-month having been completed for the specified participation months.)

Some uses include:

- Obtain a statewide unduplicated count of households for the calendar year.
- Obtain an unduplicated count of households by grantee for the calendar year.
- Obtain an unduplicated count of households by agency for the calendar year.
- Obtain an unduplicated count of households by clinic for the calendar year.
- Obtain an unduplicated count of households by their current zip code of residence for the calendar year.
- Obtain an unduplicated count of households by their current city of residence for the calendar year.
- Obtain an unduplicated count of households by their current county of residence for the calendar year.

Counts – Monthly Participation

30-Day Participation by Grantee & Agency

Description: Statewide grantee and agency participation counts for the 30-day month. (The 30-day month is the month prior to the most recent month in which EOM was completed.)

Some uses include:

- Obtain the 30-day month's count for grantees and agencies.
- Obtain the 30-day month's count for the state.

Monthly Participation by City of Residence

Revised 10.27.15

Description: A participation count for a specified month and specified agencies by current city of residence, race/ethnicity and WIC type. A participation count is also provided by clinic but is limited to those participants that still belong to the specified agencies. A last count provides the number of participants (not by city) that no longer belong to the specified agencies but were counted at them.

Some uses include:

- Obtain a monthly participation count by current city of residence and race/ethnicity.
- Obtain a monthly participation count by current city of residence and the participants' WIC type at the time of issuance.
- Obtain a count by current city of residence and clinic for those participants that still belong to the specified agencies.
- Obtain the number of participants counted at the specified agencies who no longer belong to those agencies.

Statewide Monthly Participation by Current County of Residence

Revised 2/8/2023

Description: Provides a participation count by current County of residence for the specified month, agencies, and clinics. Race/Ethnicity counts are provided for State, Agency and Clinic. WIC Category counts are provided for State and Agency.

Some uses include:

- Obtain a monthly participation count by current county of residence and race/ethnicity.
- Obtain a monthly participation count by current county of residence and the participants' WIC type at the time of issuance.
- Obtain a monthly participation count by current county of residence to ascertain how many participants outside of the agency's country are being served at each clinic.

Monthly Participation by Race/Ethnicity for State, Agencies & Clinics

Created 4.27.16; Revised 11.9.2021

Description: Participation count for a specified month by Race/Ethnicity for the state, agencies and clinics.

Some uses include:

- Obtain total participation count for a specified month for the state, an agency or a clinic.
- Obtain total participation count for a specified month by race/ethnicity for the state, an agency or a clinic.

Monthly Participation by WIC Category/BF Amount for State, Agencies & Clinics

Created 4.27.16

Description: Participation count for a specified month by WIC category, including BF amount if applicable, for the state, agencies and clinics.

Some uses include:

- Obtain a monthly participation count by WIC category/BF amount for the state, an agency or a clinic.

Monthly Participation by Zip Code of Residence

Description: A participation count for a specified month and specified agencies by current zip code of residence, race/ethnicity and WIC type.

Some uses include:

- Obtain a monthly participation count for the specified agencies by participants' current zip code of residence and race/ethnicity.
- Obtain a monthly participation count for the specified agencies by participants' current zip code of residence and WIC type.

Monthly Participation Count of Infants by BF Amount & Age – Agency

Revised 11.22.16

Description: Count and percentage of infants by breastfeeding amount (Fully, Mostly, Some-Breastfeeding and Fully Formula Fed) and age in months for the specified participation month. The report output provides a statewide count and counts by Agency. The second tab provides a list of participants more than 12 months old for record reconciliation.

Columns (depending on report tabs): Agency Name, Agency ID, Age in Months, Total Infants, Fully Breastfeeding, Mostly Breastfeeding, Some Breastfeeding, Fully Formula Fed, State WIC ID, and DOB.

Some uses include:

- Identify trends in bf amount based on age.
- Compare bf amounts percentages for a specific agency against state percentages.
- Use as baseline to determine improvements before and after bf initiatives.

Monthly Participation Count of Infants by BF Amount & Age – Grantee

Created 11.22.16

Description: Count and percentage of infants by breastfeeding amount (Fully, Mostly, Some-Breastfeeding and Fully Formula Fed) and age in months for the specified participation month. The report output provides a statewide count and counts by Grantee. The second tab provides a list of participants more than 12 months old for record reconciliation.

Columns (depending on report tabs): Grantee Name, Grantee ID, Age in Months, Total Infants, Fully Breastfeeding, Mostly Breastfeeding, Some Breastfeeding, Fully Formula Fed, Agency ID, State WIC ID, and DOB.

Some uses include:

- Identify trends in bf amount based on age.
- Compare bf amounts percentages for a specific grantee against state percentages.
- Use as baseline to determine improvements before and after bf initiatives.

Monthly Participation: Race/Ethnicity by WIC Category/BF Amount for State, Agencies & Clinics

Created 4.27.16

Description: A participation count for a specified month of race/ethnicity by WIC category, including BF amount if applicable, for the state, agencies and clinics.

Some uses include:

- Obtain a monthly participation count of WIC category/BF amount by race/ethnicity for the state, an agency or a clinic.

Participation vs. Enrollment Monthly

Created 4.7.21

Description: Provides participation and enrollment counts, and the percentage of participation, for the specified participation month for the state, all grantees, and all agencies. Clinic counts are obtained by specifying a Grantee ID, which displays the counts for that grantee’s agencies and clinics. This template replaces the HuBERT report Participation vs Enrollment Monthly (CLD029).

Columns/rows: Participation, Enrollment and % Participations for Total Women, Pregnant, Breastfeeding, Women FBF, Women Partially BF, Women MBF, Women SBF, Women FFF, Non-BF Women, Children, Infants, Infants FBF, Infants Partially BF, Infants MBF, Infants SBF and Infants FFF (NBF).

Some uses include:

- To monitor participation by eligible participants by WIC Type based for the state, by grantee, by agency or by clinic.
- No-show rates can be assessed by subtracting the % Participation from 100.

Statewide Monthly Participation by Race/Ethnicity, Months of Prenatal Participation & Breastfeeding Amount

Created 8.29.16

Description: A statewide and agency count and percentage of postpartum women by Race/Ethnicity for the specified participation month. Breastfeeding and Non-breastfeeding women are categorized based on whether they were on WIC during their pregnancy. Breastfeeding women are further categorized based on whether they were counted as Fully, Mostly or Some Breastfeeding.

Some uses include:

- Obtain a monthly count and percentage of postpartum women by race/ethnicity for an agency or the state.
- Obtain a monthly count and percentage of breastfeeding vs. non-breastfeeding women by race/ethnicity for an agency or the state.
- Obtain a monthly count and percentage of breastfeeding women who are fully, mostly or some-breastfeeding by race/ethnicity for an agency or the state.
- Obtain a monthly count and percentage of postpartum women who were on WIC for more than 3 months, less than 3 months, or not on WIC during their pregnancy for an agency or the state.

Year-to-Date Participation

Created 4.29.21; Updated 5.5.22

Description: A participation count by State, specified Grantee, its agencies and clinics for a specified Federal Fiscal Year (October-September). This template replaces the participation count portion of the HuBERT Year-to-Date Participation and Outlays report (FIN017).

Some uses include:

- Assist with monitoring and managing daily caseload for a grantee, agency or clinic.
- Obtain counts of participants by WIC Type and Breastfeeding Amount.

Year-to-Date Participation by Agency and Clinic - Statewide

Created 2/23/2023

Description: A participation count for all agencies and clinics in the state for a specified Federal Fiscal Year (October-September). This template replaces the participation count provided by the Initial & Closeout Participation report in. It will be posted to the MDH WIC Monthly Participation page each month after End-of-Month has been run.

Some uses include:

- Assist with financial distribution based on agency/clinic participation.

Counts – Unduplicated Participation

Statewide Undup CY Participation by Clinic, Agency, Grantee and Zip Code, City & County of Residence

Created 1.19.16

Description: An unduplicated calendar year participation count of participants by State, Clinic, Agency, Grantee and current Zip Code, City and County of residence.

Some uses include:

- Obtain an unduplicated calendar year participation count for the state.
- Obtain an unduplicated calendar year participation count for an agency.
- Obtain an unduplicated calendar year participation count for a clinic.
- Obtain an unduplicated calendar year participation count for a zip code (by current residence)
- Obtain an unduplicated calendar year participation count for a city (by current residence).
- Obtain an unduplicated calendar year participation count for a county (by current residence).

Unduplicated Count by Age, Race, Ethnicity & Specified City

Description: An unduplicated participation count for participants who were counted at the specified agency for the specified participation months. Counts are provided by age group and race; age group and ethnicity; age group and race/ethnicity; **specified** cities, age group, race and ethnicity, and; **specified** cities, age group and race/ethnicity. (NOTE: Since these counts are pulled from monthly caseload count tables and the report can be run for multiple months, the participants' age is based on the first time they were counted during the specified months, in order to maintain the unduplicated count.)

Some uses include:

- Obtain an unduplicated count for specified participation months for a specified agency.

- Obtain an unduplicated count for specified participation months by age group and race and for specified cities of residence.
- Obtain an unduplicated count for specified participation months by age group and ethnicity and for specified cities of residence.
- Obtain an unduplicated count for specified participation months by age group and race/ethnicity and for specified cities of residence.

Unduplicated Count by Age, WIC Type, County & City

Description: An unduplicated calendar year participation count for participants counted at the specified agency for the specified time period. Counts are provided by age groups; age groups and WIC type; age groups, WIC type and current county of residence, and; age groups, WIC Type and current city of residence.

Some uses include:

- Obtain an unduplicated count by age group.
- Obtain an unduplicated count by age group and WIC type.
- Obtain an unduplicated count by WIC type, age group and current county of residence.
- Obtain an unduplicated count by WIC type, age group and current city of residence.

Unduplicated Count by Specified Zip Codes

Created 4.9.20

Description: An unduplicated count and percentage of participants by agency who were issued benefits once during the specified participation months and currently live in the specified zip codes. The output provides two tabs. Tab 1 is based on the specified zip codes and Tab 2 on the cities that belong to the specified zip codes. Both tabs have two tables; one providing percentages based on the row totals and one based on the column totals.

Some uses include:

- Identify potential effect of the "no boundaries" change in policy for agencies serving specific zip codes.
- Identify agencies serving participants from the same specified zip codes.
- Obtain a percentage of participants who live in a specified zip code being served by an agency.
- Obtain a percentage of participants who live in the cities that belong to the specified zip codes being served by an agency.

Unduplicated Count of Women by Age

Created 6.19.18

Description: Provides an unduplicated calendar year participation count of women (pregnant, breastfeeding and postpartum non-breastfeeding) counted at the specified agency for the specified time period. Counts are provided by age (in years), age by WIC type, age by current county of residence, and age by current city of residence. An Input Control allows the user to specify the minimum and maximum ages of the participants included in the report output.

Some uses include:

- Obtain counts of participating women for certain ages by WIC type, current county of residence and current city of residence.
- Obtain an unduplicated count of teen participants.

Unduplicated Participation by WIC Type, Race Ethnicity and Cultural Identity

Revised 11.3.20

Description: This report has nine different unduplicated calendar year count outputs: statewide by agency and WIC Type (including a household count); statewide by agency and Race Ethnicity; WIC Type by Race Ethnicity for Grantee(s) (based on specified agencies); WIC Type by Race Ethnicity for specified Agencies; WIC type by Race Ethnicity for Clinic(s) (based on specified agencies; Cultural Identity Asian Non-Hispanic (NH) by Agency; Cultural Identity Asian NH by Clinic; Cultural Identity Black NH by Agency; and Cultural Identity Black NH by Clinic.

(Previously entitled: Unduplicated Participation by Agency & State Use Question #6 - Cultural Identity).

Some uses include:

- Statewide unduplicated calendar year count by WIC Type and Race Ethnicity.
- Unduplicated calendar year count for specified Agencies, Grantees and Clinics.
- Unduplicated calendar year count by WIC Type and Race Ethnicity for specified Agencies, Grantees, and Clinics.
- Unduplicated calendar year count by Cultural Identity (Asian NH or Black NH) for specified Agencies and Clinics.
- Unduplicated calendar year count by household for State and Agencies.
- Percentage of participants by Race Ethnicity for State and Agencies.
- Percentage of participants by selected Cultural Identities for specified Agency and Clinic.

Unduplicated Participation by WIC Type & Race/Ethnicity for a Specified City of Residence

Description: An unduplicated calendar year participation count for the specified agencies, specified participation months, and specified city by specified city, race/ethnicities and specified agencies; specified city, WIC type and specified agencies, and; all cities where participants who belong to the specified agencies currently live.

Some uses include:

- Obtain an unduplicated count for a specified city by race/ethnicity and agency.
- Obtain an unduplicated count for a specified city by WIC type and agency.
- Obtain an unduplicated count for all cities with participants that belong to the specified agencies.

Demographics (Information Collected in the MIS)

Count by Insurance Type (WIC Type & Clinic)

Created 5.4.16

NOTE: There is an issue with the template whereby it won't allow the full title. In Infoview, the title is COUNT BY INSURANCE TYPE.

Description: Counts and a list of participants who belong to the specified agency by Insurance Type, WIC type and clinic. Two counts are provided: 1) currently certified participants, and 2) participants certified during the specified time period (these participants are also displayed in a list).

Columns: Clinic ID, HHID, SWID, First Name, Last Name, Insurance Type, WIC Type, Cert Date and Certifier.

Some uses include:

- Identify participants certified during a specified time period who need referrals for insurance.
- Audit records of participants who don't have insurance to see if insurance referral was made by staff person (staff audit) at cert.
- Identify staff who may have forgotten to collect Insurance Type at certification ("None Selected")
- Determine the percentage of participants who have MA, MN Care, Private, Other or None for insurance.
- Determine the number of participants with specific insurance at different clinics.

Count by Insurance Type, WIC Type & Clinic where Certified

Created 5.4.16

NOTE! The Infoview report template will not accept the actual title of the report (results in an error when trying to copy from the folder). Therefore, the title has been truncated to COUNT BY INSURANCE TYPE**.**

Description: Counts of participants who were certified at the specified agency by Insurance Type, WIC type and clinic (where certified). Two counts are provided: 1) currently certified participants, and 2) participants certified during the specified time period.

Some uses include:

- Determine the percentage of participants who have MA, MN Care, Private, Other or None for insurance.
- Determine the number of participants with specific insurance at different clinics.

Count of Participants & Households by Language and Interpreter Needed

Revised 4.5.18

Previously titled: Count of Households by Language & Interpreter Needed for Specified Agency & Statewide

Description: Provides counts and percentages of currently certified participants and households by language and whether an interpreter is needed. Outputs include counts and percentages by clinic (an optional Input Control allows the output to be filtered by specific clinics), specified agency, and for the state.

Some uses include:

- Ascertain number of participants or households in clinic, agency or statewide that require interpreters.
- Assess number of different languages requiring interpreters in clinic, agency or statewide.
- Help determine if bilingual staff may be necessary for certain languages/cultures.

How Heard about WIC

Created 10.12.17

Description: Provides a count for the state and specified agency of participants certified during the specified time period by the option they selected from the How Heard about WIC drop-down. Counts include by WIC Type and by Race/Ethnicity.

Columns (depending on report tabs): Agency Total, How Heard about WIC, WIC Type, Race/Ethnicity, and State Total

Some uses include:

- Assess outreach efforts

Interpreter Needed for a Specified Language

Created 5.4.16

Description: Counts and a list of currently certified participants that belong to the specified agencies and speak the specified language. Counts are by all specified agencies and each agency individually. They include Interpreter Needed Y/N by WIC type and Interpreter Needed Y/N by households. The report also provides statewide counts by WIC type and agencies, Interpreter Needed Y/N by statewide households, and Interpreter Needed Y/N for all agencies.

Columns: HHID, SWID, First Name, Last Name, DOB, Address, City, State, Zip Code, Cert End Date, WIC Type, Interpreter Needed, Clinic ID, Agency ID and Language.

Some uses include:

- Obtain a list of participants who speak a specific language.
- Assess number of participants by WIC type who speak the specified language and require an interpreter.
- Ascertain the number of households in specified agency that require interpreters for the specified language.
- Help determine if bilingual staff may be necessary for a specific language.
- Ascertain the number of participants statewide by agency who speak a specific language and the number who require an interpreter.

Medical Clinics

Revised 7.13.20

Description: A count of participants and list of medical clinics, selected in the Demographics AdditionalInfo 1 tab, for currently certified participants who belong to the specified agency by Race Ethnicity, WIC Type, and Race Ethnicity grouped by WIC Type. The last tab (Cert Clinic) provides a count of participants by medical clinic and the WIC clinic where the participant's most recent certification was performed.

Some uses include:

- Identify medical clinics that currently serve participants for outreach.
- Identify medical clinics serving populations based on race/ethnicity.

Participants with a Language Other than English

Created 11.7.16

Description: A count and list of participants who belong to the specified agency, were counted as one of the specified WIC Types for the specified participation month, and have a language other than English selected in the Language 1 field in Demographics. The Count tab provides a count of participants, grouped by specified WIC Type, and the percentage that have a language other than English selected based on the total count for that WIC Type. It also provides counts by language, read, spoken and interpreter needed. The list indicates the language selected, whether read and/or spoken, and whether an Interpreter is needed.

Columns (depending on report tab): WIC Type, Total Count by WIC Type, Count and Percentage of participants with Language Other than English, by Language Read, by Language Spoken and Interpreter Needed; totals of individual languages by Language, Read, Spoken and Interpreter Needed; HHID, SWID, and Language, Language Read (Y/N), Language Spoken (Y/N), and Interpreter Needed (Y/N).

Some uses include:

- Identify languages and the number of participants, by WIC Type, who speak or read a language other than English at the specified agency.
- Obtain a percentage of participants, by WIC Type, that have selected, speak or read a language other than English.
- Obtain the percentage of participants, by WIC Type, with a language other than English selected who require an Interpreter.
- Provide information for the Hunger Impact Partnership grant application.

Statewide Count & Percentage of Participants Needing an Interpreter by Agency

Created 10.26.21

Description: A statewide count and percentage, by Agency, of participants needing an interpreter who are, or were, in a current certification period during the specified time-period.

Columns: Participants in Certification Period, Count with Interpreter Needed Percentage with Interpreter Needed, Count with No Interpreter Needs.

Some uses include:

- Identify interpreter requirements by agency, independent of language.

Statewide Migrant Participation Count

Created 8.20.19

Description: A statewide count and average number (for the specified number of participation months) for migrant participation.

Columns: Migrant Participation by AVG (average) and Participation Month

Some uses include:

- Used for State Office reporting of migrant participation.

eWIC

All Households with No Benefit Redemptions

Created 4.26.21; Revised 8/9/21

Description: A listing of all households that currently belong to the specified agency and haven't used any benefits in the benefit sets with a Last Date to Use (LDTU) between the specified dates. The report output has an OPTIONAL Input Control that allows the user to filter the report output by Clinic ID. (This report was formerly entitled: Households with No Benefit Redemptions.)

Columns (depending on Tab): Clinic ID, HHID, Language, Interp. Needed, Authorized Rep, Telephone #, SWID, Participant Name, DOB, Type, Prescreen, Cert Date, PFDTU, LDTU and Household Count.

Some uses include:

- Identify households that may be having trouble/issues with WIC purchases based on not having used any of their benefits.

Count of Households Issued WIC Cards & Count of Those with Some Redemption

Created 11.21.18

Description: This report provides a statewide count by agency of households issued WIC Cards, the number of households with a currently certified member, and the percentage of those issued cards; a count of households with WIC Cards, and some redemption, and the percentage of those households issued cards.

Columns: Households Issued WIC Cards (% of Certified HHs), Households with a Currently Certified Member, MINNESOTA WIC, Agency Name (ID), eWIC Households with Some Redemption (% of Issued), and Household Issued WIC Cards.

Some uses include:

- Obtain count of households issued WIC cards by agency and statewide.
- Obtain count of households with at least one currently certified member by agency and statewide.
- Obtain percentage of households issued WIC Cards by agency and statewide.
- Obtain count of households issued WIC Cards that have some redemption by agency and statewide.
- Obtain percentage of households issued WIC Cards that have some redemption by agency and statewide.

Count of Participant & Household eWIC Redemptions by Vendor

Created 4.23.19; Revised 11.20.19

Description: Provides a count of participants and households issued benefits by the specified agency that had some eWIC redemption during the specified time period by vendor. Optional Input Controls allow the report output to be filtered by clinic where benefits were issued, county where benefits were redeemed and city where benefits were redeemed.

Columns: Store Name, Store County, Store City, Participants (count) and Households (count).

Some uses include:

- Ascertain where participants issued eWIC benefits by an agency/clinic are shopping (stores, counties and cities)

New Households with No Benefit Redemptions

Created 8/9/21

Description: A listing of all new households that currently belong to the specified agency and haven't used any benefits in the benefit sets with a Last Date to Use (LDTU) between the specified dates. New households are defined as having a Household ID with a created date within 182 days of the Last Date to Use. However, the report has an OPTIONAL Input Control that allows the user to enter a date between 6 months ago and the specified LDTUs to narrow the time-frame for the definition of new households. As well as an Input Control that allows the user to filter the report output by Clinic ID.

Columns (depending on Tab): Clinic ID, HHID, HHID Created Date, Language, Interp. Needed, Authorized Rep, Telephone #, SWID, Participant Name, DOB, Type, Prescreen, Cert Date, PFDTU, LDTU and Household Count.

Some uses include:

- Identify new households that may be having trouble/issues with WIC purchases based on not having used any of their benefits.

Total Replacement WIC Cards

Created 11.13.19

Description: A list of households, with at least one currently certified member, that belong to the specified agency and have had more than one card issued since the beginning of eWIC. It also provides the number and percentage of households with replacement cards who have a language other than English for Language1 (the language displays for those households). The State count provides a total number and percentage of households that have had more than one card assigned since the beginning of eWIC by agency, the total number of households with a currently certified member, and the number and percentage of households with replacement cards who have a language other than English selected for Language 1.

Columns (depending on report tab): Clinic Where Household is Currently Assigned, Households with More than One WIC Card Assigned, Total Number of Replacement Cards, HHs with Primary Language Not English and Replaced Cards, Agency Name, and Households with Certified Member(s)

Some uses include:

- Obtain a list of households that belong to an agency and have had a frequent replacements of cards.
- Identify households with a primary language other than English to assess if language is a factor affecting replacement numbers.
- To get an idea of how many replacements are actually occurring compared to the number of households with certified members.

WIC Card and/or Primary Cardholder Not Assigned to Representative

Revised 2/15/2023

Description: This report provides a list of all households by specified agencies, and statewide count of households for all agencies, whose WIC Card and/or Primary Cardholder (PCH) are currently assigned to a row that begins with a State WIC ID in the EBT Household Demographics screen (instead of one of the representative rows - Authorized, Alternate/Proxy 1 or Alternate/Proxy 2). The Agency ID(s) are based on the agency where the most recent card signature was recorded.

Columns (depending on report tab): Agency ID (where signature collected), Date (most recent WIC Card signature record), HHID, Staff ID, WIC Card and/or PCH assigned to, Agency Name (ID), and Total Count of Households.

Some uses include:

- To ensure the transition to WINNIE goes smoothly, all households with a WIC Card and/or PCH assigned to a row that begins with a State WIC ID should be reassigned to the Authorized Representative row.
- Help identify staff that may need more training to ensure new records are not created with the WIC Card and/or PCH assigned to a row beginning with a State WIC ID.

WIC Cards Issued

Created 9/21/22

Description: This report provides a list of households issued WIC Cards during the specified time period. The output is grouped by the clinic where the WIC Cards were issued. An OPTIONAL Input Control allows the report user to filter the results by Clinic ID.

Columns (depending on report tab): Clinic ID (where card issued), HHID, Staff ID, Date Card Issued, WIC Card #, Total Count of Households, Total Count of Cards, Agency ID.

Some uses include:

- Help monitor card amounts issued.

- Identify cards issued by staff to specific households.

Food & Formula

Contract Formula Procurement Report

Created 7.29.21

Description: Statewide counts of infants and children issued contract formula for the specified time-period. Ideally, it should be run for 6 months since a 6-month average is provided. It provides a count of exclusively breastfed infants, infants issued milk-based and soy-based formula by formula description, and children issued milk-based and soy-based formula by formula description for the specified participation months.

Some uses include:

- Formula Contract Procurement RFP.
- Statewide count of infants receiving contract and medical formula.
- Statewide participation count of fully-breastfed infants.

Count by BF Amount of FBF Infants & Infants Issued a Full Package of Powdered Contract Formula for the Specified Agency & State

Description: A count and percentage of infants by BF amount who were counted at the specified agency for the specified participation month. Non-BF, Mostly-BF and Some-BF infants are only counted if they were **issued a full package of powdered contract formula.** This report also provides a count and percentage for each agency in the state and a statewide total.

Some uses include:

- Assess the number/percentage of infants who are partially breastfed and also receiving a full package of powdered formula by clinic.
- Compare percentage of partially bf infants receiving a full package of formula to other agencies in the state and against the statewide percentages.
- Use as baseline to determine improvements before and after bf initiatives to reduce formula supplementation.

Count of Participants Issued Medical Formula by Specified Agency and State

Revised 6.10.20

Description: This template provides three reports: A count of all participants, by the medical formula issued and the clinic where the *formula was issued*, during the specified time period at the specified agency; a list of the participants by State WIC ID and the medical formula issued grouped by the clinic where the participant *currently belongs*; and a State total count of participants by medical formula. Note that this report has Input Controls that can be used to optionally filter the clinics listed in Tabs 1 and 2.

Columns/Rows (depending on report tabs): Clinic, Agency Total, Medical Formula, Clinic & Agency Totals, State WIC ID, State Total, and Count of Participants Issued.

Some uses include:

- Identify medical formulas issued during a specified time period.
- Obtain a count of participants issued various medical formulas during a specified time period for the specified agency and clinic(s).
- Obtain a list of participants for chart follow-up based on the clinic where the participant currently belongs.
- Obtain a count of participants issued medical formula statewide during a specified time period.

Food & Formula Items Issued by PFDTU

Description: A list of participants (women, infants and children) who belong to the specified agencies and were issued the specified food/formula item(s) (reference provided) on benefits with a Printed First Date to Use (PFDTU) during the specified time period. The report also provides a count of participants by agency, food/formula item and WIC Type. Lastly, it provides a combined list based on the person who issued the benefits with the specified food item(s).

Columns (depending on report tabs): Agency ID, HHID, SWID, WIC Type, First Name, Last Name, Cert Start Date, Cert End Date, DOB, PFDTU, Address, State, City, Zip Code, Auth Rep's Name, Telephone #, Food Item Description, Quantity of Item on Set of Benefits, Auth Rep FN, Auth Rep LN, Mail Address, Mail City, Mail State, Mail Zip, Issuing Staff ID and Staff Name.

Some uses include:

- Obtain list of participants who received a specified food/formula item during a specific time period.
- Ascertain number of participants receiving a specified food/formula item.
- Information provided if necessary to contact participant receiving a specified food/formula item; can also create labels.
- Identify staff issuing a specified food/formula item.
- Obtain list of all food/formula items and whether active, including effective dates.

Food & Formula Items Issued on Last Set of Benefits

Description: A list of currently certified participants (women, infants, and children) who belong to the specified agencies and were issued the specified food/formula item on their most recent set of benefits. The report also provides a count of participants by WIC Type (P, N, B, I, C), specified food/formula item(s) and clinics. The references for food/formula items do not include special/medical formula but this report could be run for those items if the Food Item ID is known.

Columns (depending on report tabs): Food Item ID, Food Item, Agency ID, Clinic ID, HHID, SWID, WIC Type, First Name, Last Name, Cert Start Date, Cert End Date, DOB, Last Set LDTU, Address, City, State, Zip Code, Auth Rep's Name, Telephone #, Food Item and Quantity of Food Item(s) on Set of Benefits.

Some uses include:

- Obtain list of participants who received a specified food/formula item on their last set of benefits.
- Ascertain number of participants who received specified food/formula item.
- Information provided, if necessary, to contact participant who received a specified food/formula item on their last set of benefits.

Food & Formula Item(s) Issued Statewide by PFDTU or LDTU in Past 6 Months

Revised 12.13.18

Description: This report provides two different statewide counts for the specified food/formula item(s) (reference provided) by WIC Type and the agency that issued the benefits. The first statewide count is based on the specified food/formula item(s) being issued on a set of benefits having a Printed First Date to Use (PFDTU) during the specified time period. The second statewide count is based on the specified food/formula item(s) being issued on the last set of benefits where the last set's Last Date to Use (LDTU) falls within the past 6 months.

Columns (reference tab): Food Item ID, Food Item Description, Active?, Effective Date and Expiration Date.

Some uses include:

- Obtain count of participants by WIC Type receiving specific food/formula items by agency and for the state.
- Assess prevalence of food/formula item issuance.
- Obtain list of all food/formula items and whether active, including effective dates.

Formula Issued – Local Agency Breakdown & State Summary

Created 11.24.20

Description: This report replaces, and combines, the Formula Issued – Local Agency Breakdown and Formula Issued – State Summary reports that were run at the same time End-of-Month was run and that were previously posted in the AGENCY EOM >> [Year] >> [Year Month] >> Minnesota Reports folder.

It provides a list of formulas issued by each agency, as well as statewide, and the number of participants who were issued each formula. An OPTIONAL input control allows the output in the Agency tab to be filtered by Agency ID.

Columns (depending on tab): Agency ID, Participation Month, Distribution Item ID, Formula Description, Number of Participants.

Some uses include:

- Comparison of State and Local Agency totals for issuance of formula
- Obtain count of participants receiving a specific type of formula or formulas.
- Identify which agencies are issued a specific type of formula

Infants by Age Issued CSP Formula on Last Set of Benefits and Assigned Specified Risk Factor(s)

Created 9.27.17

Description: Provides a list of infants who belong to the specified agency and were issued Condition-Specific Protocol (CSP – 19 calorie) formula on their last set of benefits and assigned any of the specified risk factors. An optional input control allows the report user to filter the infants by their current age in months (the default is between 0 and 6 months).

Columns (depending on report tabs): HHID, SWID, First Name, Last Name, DOB, 19 Calorie Formula, Special RX Start Date, and Risk Factor(s)

Some uses include:

- Identify infants with certain risk factors receiving 19 calorie formula.

Infants by BF Status, Cans of Formula Issued and Age - AGENCY

Description: This report was developed to help assess whether the maximum amount of formula is being routinely provided to partially breastfed (MBF and SBF) infants. It provides a count and percentage of FBF infants and 1) all infants counted; 2) all infants issued formula, and; 3) infants issued a full package of powdered contract formula. Counts and percentages are also provided for MBF and SBF infants by cans of formula and age (in months and categories as of the PFDTU) for those issued a full package of contract formula. Lastly, two lists are provided: 1) infants issued more than the full allotment (due to syncing packages), and 2) partially and non BF infants including the issuing staff person.

Columns (depending on report tabs): Clinic ID, SWID, Quantity, HHID DOB, Age (as of PFDTU), Quantity/Description of Formula Issued on Benefit, PFDTU, Staff Issued Benefits and Ethnicity/Race.

Some uses include:

- Assess the number/percentage of infants who are partially breastfed and also receiving a full package of powdered formula by clinic.

- Determine the number of infants issued more than the max amount typically allowed for a participation month due to syncing packages.
- Use as baseline to determine improvements before and after bf initiatives to reduce formula supplementation.
- Identify staff who may routinely issue max packages of formula.
- Assess whether certain race/ethnicities receive max package more often.

Infants by BF Status, Cans of Formula Issued and Age - STATE

Description: This report was developed to help assess whether the maximum amount of formula is being routinely provided to partially breastfed (MBF and SBF) infants. It provides a count and percentage for all agencies in the state of FBF infants and 1) all infants counted; 2) all infants issued formula, and; 3) infants issued a full package of powdered contract formula. Statewide and individual agency counts and percentages are also provided for MBF and SBF infants by cans of formula and age (in months and categories as of the PFDTU) for those issued a full package of contract formula. Lastly, infants issued more than the full allotment (due to syncing packages) are listed by Agency ID.

Columns (depending on report tabs): Agency ID, SWID and Quantity.

Some uses include:

- Assess the number/percentage of infants who are partially breastfed and also receiving a full package of powdered formula by clinic.
- Identify agencies that have a large number of infants issued more than the max amount typically allowed for a participation month due to syncing packages.
- Compare agency percentages to state and other agencies.
- Use as baseline to determine improvements before and after bf initiatives to reduce formula supplementation.

Medical & Condition Specific Protocol Formulas & Staff Who Created Rx

Description: A list of participants issued medical formula or a Condition Specific Protocol (CSP) formula by the specified agency for the specified participation month. Also provides a detailed list of each participant's prescriptions, including the staff who created them, and a total count by clinic.

Columns (depending on report tabs): Clinic ID, HHID, SWID, DOB, WIC Type, Cert Date, MCA Date, Last LDTU, Benefit Dates, Special Formula Issued, Date of Food Package, Date RX Created, Special/Medical Formula, Condition Specific Protocol Formula, RX Start Date, RX End Date and Staff ID.

Some uses include:

- Identify participants issued benefits for medical or CSP formula for a specific participation month.

- Obtain a count of participants issued medical or CSP formula by clinic.
- Review all special prescriptions for the participants in this report output.
- Identify staff who created specific special prescriptions.

Medical Formula by Rx End Date

Revised 11.9.20

Description: A list of participants who belong to the specified agency and have a food prescription for a medial formula that ends during the specified time period. In order for participants to be included in the report output, they must have been issued the medical formula on their last set of benefits. An OPTIONAL input control allows the report user to filter the report by the clinic where the participant belongs.

Columns: SWID, HHID, Participant's Name, Authorized Representative's Name, DOB, Telephone #, Medical Formula, Clinic, Approval Length, WIC Type, Rx Start, Cert Start, Rx End, Cert End, Last LDTU and MCA Due.

Some uses include:

- Identify participants that may need a new prescription for medical formula before more benefits can be issued. Identify participants whose medical formula prescription is ending for outreach (inform participants they will need a new prescription to receive the same formula the next time benefits are issued).

Medical Formula by Rx Start Date

Description: A list of participants who belong to the specified agency and have a medical formula prescription start date during a specified time period. The report also includes the staff person who created the prescription.

Columns: HHID, SWID, WIC Type, Rx Start Date, Rx End Date, Approval Length, Medical Formula, Clinic ID, Staff Name (created the Rx) and Staff ID.

Some uses include:

- Identify participants with a prescription start date during a specific time period.
- Audit staff for prescription approvals, approval lengths, etc.

Medical Formula Issued by PFDTU

Revised 6.11.20

Description: A list and count of infants, children, and women issued special/medical formula by the specified agency with a Printed First Date to Use (PFDTU) during the specified time period. The output also provides a statewide total count of participants issued medical formula, issued any type of formula (medical or contract), and the percentage of medical formula issued by agency.

Columns (depending on report tabs): HHID, SWID, medical formula description, Rx End Date, PFDTU and WIC Type.

Some uses include:

- Obtain a list of participants issued benefits for a specific time period with medical formula on it.
- Ascertain the percentage of participants issue formula receiving medical formula.
- Compare an agency's percentage of participants receiving medical formula to other agencies and the state.

Medical Formula Issued on Last Set of Benefits

Revised 3.29.16

Description: A list of currently certified participants (women, infants and children) who belong to the specified agency and received the specified medical formula(s) on their last set of benefits issued. The report also provides an agency total count and clinic count by medical formula(s) and WIC Type.

Columns: Agency, Clinic ID, medical formula name, Qty., WIC Type, HHID, SWID, Last Name, First Name, DOB, Cert Date, Cert End Date, Last Set LDTU, Telephone # and Authorized Rep's Name.

Some uses include:

- Identify participants issued benefits for medical formula on their last set of benefits.
- Obtain a count of participants issued medical formula by WIC Type and clinic.

Purchased Formula by UPC(s)

Created 8/15/2022

Description: Provides a list of participants who belong to the specified agency and purchased a formula, based on the specified UPCs, during the specified dates. Report users should use the MN WIC Approved Product Listing (APL), available on the MDH WIC website, to identify UPCs. (NOTE: If the UPC starts with any zeros, only the digits after the zero(s) should be entered into the PROMPT.) The report provides two OPTIONAL input controls that allow the user to filter the outputs by clinic ID and Printed First Date to Use (PFDTU).

There are two outputs:

- Tab 1: Participant List – list can be sorted as desired in Infoview (or after exporting to Excel).
- Tab 2: List by UPC – list is grouped by UPC.

Columns (are the same in both tabs): Agency, Clinic ID, HHID, SWID, WIC Type, Age in Months, PFDTU, Purchase Date, UPC, Participant's Name, Authorized Rep's Name, Telephone #, Mail Address, Mail City, State, Mail Zip.

Some uses include:

- Identify participants who purchased a specific formula. This was created due to the milk-based formula contract transition from Similac to Enfamil. The following are all the Enfamil UPCs, which can be copied and pasted (if necessary) into the PROMPT. (NOTE: the template was saved with these UPCs in the PROMPT.) A listing of the formulas the UPCs correspond to can be found in the **Formula Listing** at the end of the Guidance Document or the APL since **the name of the formula will NOT display in the report; only the UPC displays**.

  300871365421;300875111321;300875111574;300875117484;300875119761;300875120415;300875121078;300875121092;300875121115;300875121276;300875125755;300875126820;300875127483;300875124529;300875124543;300870201423;300870201652;300875100967;300875126424;300875100691;300875119785;300875121191;300875121214;300875121238;300875121252;300875123539;300875123553;300875127506;300875128794;300875129609
- Provide contact information for participants who purchased a specific formula.

Group Education

Group Class Roster

Created 3.18.18

Description: Provides a list and count of participants scheduled for group classes at the specified agency during the specified time period. Three optional Input Controls allow the report user to filter the output by the clinic where the group class is scheduled, the group class topic and the resource.

Columns (depending on report tab): Clinic ID, Resource, Date, Time, HHID, SWID, Participant, WIC Type, Telephone #, Authorized Rep, Language and Interp. Needed

Some uses include:

- Generate a list of participants scheduled for group education classes

Group Education Classes and Local Use Question #1

Created 2.11.20

Description: A list of participants scheduled for a group education class at the specified agency and during the specified time period. The output includes the selection for Local Use Question #1 and an optional Input Control to filter the results by Clinic ID.

Columns (depending on report tab): Group Education Class Topic, Class Date, Class Time, HHID, First name, Last Name, Telephone #, Language, Local Use Question #1, and Clinic Name

Some uses include:

- of participants scheduled for group education classes for outreach based on their selection from Local Use Question #1.

Height/Weight & Blood

Hemoglobin Measurements

Revised 6.28.17

Description: A list and count of participants who belong to the specified agencies and had a hemoglobin measurement during the specified time period. The report output also includes the staff person who performed the measurement and whether it was performed during an MCA. Lastly, it provides a count of measurements, a count of participants, and hemoglobin measurements performed at a MCA by Clinic ID.

Columns (depending on report tab): Agency Name, Agency ID, Clinic ID, HHID, SWID, WIC Type, First Name, Last Name, DOB, Hgb Date, MCA, Hgb, Staff ID, Address, City, Zip Code, Count of Hgb Measurements, Unduplicated Count of Participants and Count of Hgb Measurements Performed at MCA.

Some uses include:

- Obtain general number of cuvettes used during a recent specified time period.
- Obtain general number of hemoglobin measurements performed at a clinic during a recent specified time period.
- Identify staff who performed hemoglobin measurements during a recent specified time period for chart audits.

Hemoglobin Not Done

Description: A list of participants who belong to the specified agencies and have more than one hemoglobin record with the Exception Reason *CPA determined not due for blood* within the past nine months.

Columns: SWID, Agency ID, Clinic ID, DOB, WIC Type, Blood Rcd Date, Age as of Date, Exception Reason, Hgb Value, Staff ID and Enter Into (CGS/PF/MCA).

Some uses include:

- Identify staff who may be using the Exception Reason incorrectly or too often and may need training on bloodwork requirements.
- Identify participants who are overdue for bloodwork.

Low Hemoglobin

Revised 11.21.16

Description: A list of participants, based on their WIC Type at the time of measurement, who belong to the specified agencies and have had a hemoglobin measurement taken during the specified time period that is less than or equal to the specified hemoglobin value. The report output includes three different lists: 1) A list and count of all participants with a low hemoglobin; 2) A list of all hemoglobin records for those participants; and 3) A list of the most recent hemoglobin measurements that have occurred since the Start Date entered into the prompt.

Columns (depending on report tabs): HHID, SWID, DOB, Age at Measurement, Staff ID, Measurement Date, Hgb Value, WIC Type at Measurement, Measured at Cert/Recert, Current Cert Start Date, Current Cert End Date, Current WIC Type, High Risk – Most Recent Cert, Race/Ethnicity or Cultural Identity, Next Appt Date, Clinic ID, Months bn Measurements, Change, Reason if No Hgb Value, Months b/n Measurements, and HR FU Note.

Some uses include:

- Identify participants with low hemoglobin for chart audits or follow-up.
- Review all hemoglobin records to determine whether WIC intervention has been successful.

Staff Who Performed Height, Weight & Blood

Description: A list of participants who were certified or had an MCA performed at the specified agencies during the specified time period. The report also provides the Staff IDs of the person who completed the cert/MCA and the Staff ID of the person who performed the height/weight and blood measurements.

Columns (depending on report tabs): Agency ID, Clinic ID, HHID, SWID, Date of Birth, WIC Category at Cert, Cert Start Date, Certifier, Age at Ht/Wt Measurement, Ht/Wt Date, Ht/Wt – Staff ID, Hgb Value, Hgb – Staff ID, MCA Date, and MCA Certifier.

Some uses include:

- Audit anthropometric measurements and the staff who performed them.

Unknown Height/Weight & COVID-19 Bloodwork Exception Reason

Description: A list of participants who belong to the specified agency that have an Unknown Height/Weight or COVID-19 Bloodwork Exception Reason recorded during the specified time period. An OPTIONAL Input Control allows the user to filter both outputs by Clinic ID.

Columns (on both tabs): Clinic ID, HHID, SWIC, WIC Type, Measurement Date, Cert Start Date, MCA Due Date, MCA Date, and Cert End Date.

Some uses include:

- Identify participants with Unknown Height/Weight records.
- Identify participants with the COVID-19 Bloodwork Exception Reason selected.

High Risk

High Risk & Follow-up Note

Revised 2.21.17

Description: Lists and counts of high risk participants who belong to the specified agency and do or don't have a High Risk Follow-up note written within 30-120 days of the cert or MCA completed during the specified time period. In order to be included in the report output, participants must have also been **issued** a set of benefits within 30 to 120 days of their cert or MCA. This ensures that only participants where there was an opportunity to write a follow-up note are included. Also provides total counts and percentages by agency, clinic and combined.

Columns (depending on report tabs): Clinic ID, HHID, SWID, DOB, WIC Type, Cert Date, MCA Date, Cert End Date, Issued Date, Note Written by, Note Date, Days bn Cert & FU, Days bn MCA & FU, Note Subject, Risk Factors Assigned, and HR Resolved?

Some uses include:

- Audit whether high risk follow-up documentation has been completed for high-risk participants who have subsequently returned for services.
- Identify staff who have written high risk follow-up notes in order to audit documentation.
- Ascertain the percentage of follow-up visits (based on when the note was written) occurring between 0-45, 46-90 and 91-120 days from the cert/MCA.

High Risk & Follow-up Note for Specified Risk Factor

Created 9.22.16

Description: Lists and counts of high risk participants who belong to the specified agency, were assigned the specified risk factor, and do or don't have a High Risk Follow-up note written within 30-120 days of the cert or MCA completed during the specified time period. Also provides total counts and percentages by agency, clinic and combined.

Columns (depending on report tabs): Clinic ID, HHID, SWID, DOB, WIC Type, Cert Date, MCA Date, Cert End Date, Last LDTU, Note Written by, Note Date, Days bn Cert & FU, Days bn MCA & FU, Note Subject, Risk Factor, and HR Resolved?

Some uses include:

- Audit whether high risk follow-up documentation has been completed for high-risk participants who were assigned a specific risk factor.
- Identify staff who have written high risk follow-up notes for a specific risk factor in order to audit documentation.
- Ascertain the percentage of follow-up visits (based on when the note was written) occurring between 0-45, 46-90 and 91-120 days from the cert/MCA for a specific risk factor.

- Identify high risk participants who were certified or had an MCA performed during the specified time period and were assigned a specific risk factor.

High Risk at Certs & MCA by Staff ID

Revised 11.23.20

Description: A list and total count of participants who were certified, or had an MCA completed, at the specified agencies during the specified time period and were assigned high risk.

Columns (depending on report tabs): Agency , Staff ID, SWID, WIC Type at Cert, Cert Date, HR Resolved, Clinic where MCA Completed, Current WIC Type, Clinic where certified, and MCA Date.

Some uses include:

- Monitoring high-risk participants' INCPs and follow-up.
- Identify staff who may require more education re: following correct procedures and documentation for high-risk participants.

Participant High Risk Report

Created 4.27.21

Description: Provides a list of high-risk participants who belong to the specified agency and are in a certification during the specified report month. The output also includes the next appointment scheduled and all risk factors assigned, as well as a tab with household contact information. An OPTIONAL input control allows the user to filter by Clinic (where the participant currently belongs). This template replaces the HuBERT Participant High Risk Report (CLN019).

Columns (depending on report tabs): Clinic ID, HHID, SWID, Participant Name, Authorized Rep's Name, Telephone #, Mail Address, Mail City, Mail State, Mail Zip Code, WIC Type, DOB, Cert End Date, Next Appointment (Date, Time and Description), and Assigned Risk Factors

Some uses include:

- Identify high-risk participants who were certified during the specified report month.

Statewide Count of Currently Certified High Risk Participants by Race/Ethnicity & Agency

Created 4.25.16

Description: This report is a "snapshot in time" count of currently certified high risk participants. It provides a statewide count and percentage by Race/Ethnicity and Agency.

Some uses include:

- Obtain count of currently certified participants by Race/Ethnicity.
- Obtain count and percentage of currently certified high risk participants by Race/Ethnicity.
- Assess whether certain races tend to have higher percentages of high risk.
- Compare percentages of high risk participants to state and other agencies.

Statewide Count of Currently Certified High Risk Participants by WIC Type & Agency

Created 4.25.16

Description: This report is a "snapshot in time" count of currently certified high risk participants. It provides a statewide count and percentage by WIC Type and Agency.

Some uses include:

- Obtain count of currently certified participants by WIC Type.
- Obtain count and percentage of currently certified high risk participants by WIC Type.
- Compare percentages of high risk participants to state and other agencies.

Households

Currently Certified Households

Created 5.5.20

Description: A list and count of households belonging to the specified agency with at least one currently certified member.

Columns (depending on report tabs): HHID, Telephone, Comment, Language, and Authorized Rep's Name

Some uses include: Obtain a list of active households for outreach/texting platform.

Households by Race Ethnicity, Agency, Prescreen Date and County

Revised 12.1.20

Description: An unduplicated list of households issued benefits based on specified participation months and the Race Ethnicity "assigned" to that household based on either belonging to the mother in the household or, if no mother is associated with the household, the eldest child in the household. If benefits were issued to the same household by more than one agency, the agency that issued benefits first during the time period is the agency the household is associated with.

Columns (depending on report tabs): HHID, Race Ethnicity, Agency, Prescreen Date, and County

Some uses include: Assign a Race Ethnicity and agency to a household to be used for household benefit utilization reports.

New Households

Created 5.5.20

Description: A list and count of new households belonging to the specified agency. New households are based on the first member in a household being certified during the specified time period whose Household ID was also newly created within 30 days of their cert date.

Columns (depending on report tabs): HHID, Telephone, Comment, Language, and Authorized Rep's Name

Some uses include:

- Obtain a list and count of new households during a specified time period that belong to a specific agency.
- Obtain a list of active households for outreach/texting platform.

Income

Currently Certified & Adjunctive Programs

Created 10.23.19

Description: Provides a list and count of currently certified participants who belong to the specified agencies and have had an adjunctive program selected for their most recent income contact. Two OPTIONAL input controls allow the report user to filter the participant list by WIC type and adjunctive programs. The count is based on adjunctive program by WIC type (children are broken down into age categories).

Columns (depending on report tabs): Agency ID, Clinic ID, HHID, SWID, WIC Type, DOB, Age in Months, Cert End Date, Adjunctive Program, Infants, Children, Infants & Children, Children 12-23 Months, Children 24-35 Months, Children 36-47 Month, Children 48-60 Months, Women, Pregnant, PPBF and PP NBF.

Some uses include:

- Identify participants with adjunctive programs selected.
- Identify types of adjunctive programs most commonly selected for income.

Pending Proof of Income Checkbox Not Selected

Description: A list of participants who were certified at the specified agency during the specified time period and whose proof of income for their most recent certification has *Adjunctive Eligibility – 30 Day, **PENDING PROOF*** or *Other-Write Note* but does **not** have the

Pending Proof of Income checkbox selected. Also provides a count of participants that meet these criteria by Staff ID.

Columns (depending on report tabs): Staff ID, HHID, SWID, Most Recent Cert Date, Date of Income Record, Last Set's LDTU and Proof of Income.

Some uses include:

- In order for HuBERT to limit issuance to one month, the Pending Proof of Income checkbox must be selected. Identify participants who may have received more than one month of benefits (based on last set's LDTU) with income proof pending.
- Identify staff who are not selecting the checkbox and may require further HuBERT/income training.

Presumptive Eligibility

Description: A list of participants who belong to the specified agencies and for whom *Presumptive Eligibility – 90 Day* was selected for the Income Proof during a specified time period. Also provides a count of participants with this proof selected for the state and all agencies.

Columns: Agency Name, Agency ID, HHID, SWID, Staff ID, PE Date and MA or MN Care.

Some uses include:

- Identify participants who may be presumptively eligible and audit to ensure appropriate follow-up and documentation occurred.
- Obtain a statewide count of participants that had this proof selected during a specified time period.
- Obtain a count of participants that had this proof selected during a specified time period by agency.

Proof of Income

Created 4.20.17

Description: A list of participants certified at the specified agency during the specified time period who had an income record created with the specified proof(s) of income. A reference tab provides the proof of income ID and its description.

Columns (depending on tab): Proof of Income ID, Description, HHID, SWID, Income Record Date, Staff ID.

Some uses include:

- Identify participants to ensure correct documentation is occurring based on selected Proof of Income.

Initial Contacts

Initial Contacts

Revised 9.12.16

Description: A list and total count of participants with an Initial contact during the specified time period for the specified agency, clinics and WIC types. It also includes the Staff ID. This report should match the HuBERT Initial Contacts report (CLN040).

Columns: WIC Type, HHID, SWID, Contact Created by Staff ID, Contact Modified by Staff ID, Initial Contact Date, First Appointment Offered Date, Cert Date, Processing Standard # of Days, Initial Contact Type, Comments, Migrant at Initial Contact

Some uses include:

- Provides same information as HuBERT Initial Contact report but may be easier to run since HuBERT clinic application does not have to be closed to run Infoview templates.
- Identify staff not meeting processing standards or who may require more training.
- Identify clinics that aren't meeting processing standards and may require more appointment schedules.

Incomplete Initial Contacts

Revised 9.13.17

Description: Provides a list and count of participants certified at the specified agency during the specified time period who have an Initial Contact (IC) record that has not been completed based on both the First Appointment Offered Date and the Comments field being blank (excluding those with Initial Contacts due to VOCs). The report output also includes a total count by staff. NOTE: This report does not assess whether the Initial Contact was required for the participant; only that an Initial Contact was created and not completed.

Columns (depending on report tab): SWID, Cert Date, WIC Type at Cert, Staff Created IC, IC Created Date, IC WIC Type, First Appt Offered Date, Comments, IC Type, Staff Created Initial Contact, Total and Agency Total.

Some uses include:

- Identify participants for whom an Initial Contact was created but never completed.
- Identify staff creating Initial Contacts but not completing them.

Initial Contact Requirements Not Met

Revised 5.18.20

Description: Provides lists of participants certified at the specified agency during the specified time period for whom an initial contact was required but not created (excluding those assigned risk factor 502-VOC). The report output also provides the staff ID of the person who scheduled the most recent appointment prior to the certification and total counts/percentages of participants who had an appointment scheduled, required an Initial Contact, and didn't have one created. (Due to CDP-249/TMP-290, records are included based on an Initial Contact record being created within 60 days of the Cert Start Date. Therefore, for best results, it should be run within 60 days of the desired time period.)

Start Date, Appt Date, Appt Scheduled By, Appt Created Date, WIC Type at Cert, Previous Cert End Date, Current Cert Start Date, Days bn Cert End Date & Appt Created Date, Current WIC Type, Count of Pregnant – No IC (with appts scheduled), Count of Others – No IC (with appts scheduled), and Total – No IC (with appts scheduled).

Some uses include:

- Monitor whether Initial Contacts are being created for participants requiring an Initial Contact.
- Identify staff creating appointments for participants who require an Initial Contact but didn't have one created.

Local Use Questions

Due for Additional Education Contact & Local Use Question #2

Revised 9.28.20

Description: A list of participants who currently belong to the specified agency and whose Last Date to Use (LDTU) occurs during the specified time period and who have an answer selected for Local Use Question #2. The output also provides household labels. The intent is to identify households that may be eligible for alternative forms of nutrition education. Therefore, this report output differs from the due for benefit pick-up report because it excludes participants that belong to households with other members who are due for a cert/recert and who have appointments within 30 days of the last set's LDTU. It also includes fully breastfed infants less than 6 months of age and some-breastfeeding women more than 6 months postpartum since they require an additional nutrition education contact even though they are not issued benefits.

Columns (depending on report tab): HHID, SWID, Last Set's LDTU, High Risk, Participant's Name, Authorized Rep's Name, Telephone #, MCA Due Date, Cert End Date, Next Appt, WIC Type, DOB, Lang., Interp. Needed, LUQ #2, Online Lesson Completed, Phone Contact 1, Phone Contact 2, Final Contact, Clinic ID, Mailing Address, City, State and Zip Code.

Some uses include:

- Identify households and participants, with an answer for Local Use Question #2, that may be eligible to receive alternate forms of additional nutrition education.

Local Use Questions #1 & #2 by Answer Date

Created 1.7.20

Description: List of participants who belong to the specified agencies who had options selected for Local Use Question #1 and Local Use Question #2 during the specified time period. An OPTIONAL Input Control allows the report output, on each report tab, to be filtered by the selected options.

Columns (depending on report tab): Clinic ID, HHID, SWID, WIC Type, Cert Start, LDTU, LUQ1 Answer Date, LUQ1 Selection, LUQ2 Answer Date, and LUQ2 Selection.

Some uses include:

Identify participants with specific responses to Local Use Question #1 and/or Local Use Question #2.

Local Use Questions #1 and #2 for Certifications and Completed MCAs

Revised 6.16.21

Description: A list and count of participants who have been certified or had a Mid-certification Assessment (MCA) completed during the specified time period at the specified agency. All participants display regardless of whether options are selected for Local Use Questions #1 and #2. Table breaks, page breaks, and counts occur so that participants who have the same answers are grouped together. Tab 2 includes a count for households and participants by individually selected answers for Questions #1 and #2.

Columns (depending on report tab): HHID, SWID, Visit Date, Participant Name, PPT DOB, PMI #, Parent/Main Proxy Name, Telephone 1, Telephone 2, Clinic ID, Staff Person, Question #1 - Selected Answer, Question #2 - Selected Answer, and Total Distinct Counts

Some uses include:

- Capture participants with a cert or MCA completed during the specified time period by the answer selected in Local Use Question #1 and #2.
- Obtain counts of participants with a specific answer selected for either Question #1 or Question #2.
- Obtain a total count of participants certified or with a MCA performed during a specified time period.

Local Use Question #1 for Certifications & Completed MCAs

Revised 4.30.18

Description: A list and count of participants who have been certified or had a Mid-certification Assessment (MCA) completed during the specified time period at the specified agency, grouped by the answer selected for Local Use Question #1. Includes a count for households and participants by the selected answer.

Columns (depending on report tab): HHID, SWID, Visit Date, Participant Name, Participant DOB, Parent or Main Proxy Name, Clinic ID, Selected Answer, Staff Person, Household Counts and Participant Counts.

Some uses include:

- Capture participants with a cert or MCA completed during the specified time period by the answer selected in Local Use Question #1.
- Obtain a total count of participants certified or with a MCA performed during a specified time period.

Local Use Question #1 Answered during Same Specified Time Period as Completed Certifications & MCAs - Household List

Created 8.27.19

Description: A list of households with at least one member who currently belongs to the specified agency and has been certified, or had a Mid-certification Assessment (MCA) completed, and had Local Use Question #1 answered during the specified time period. This provides a list of households with updated, or new answers, instead of all households with an answer selected for Local Use Question #1.

Columns (depending on report tab): HHID, Telephone #, Language, Authorized Representative, Selected Answer and Answer Date.

Some uses include:

- Obtain a list of households with updated or new answers for Local Use Question #1 that were obtained during the same time period specified for completed certs or MCAs.

Local Use Question #1 for Certifications & Completed MCAs – Household List

Created 7.19.19

Description: A list of households with at least one member who currently belongs to the specified agency and has been certified, or had a Mid-certification Assessment (MCA) completed, during the specified time period, along with the **answer currently selected** for Local Use Question #1.

Columns: HHID, Telephone #, Language, Authorized Representative, and Selected Answer

Some uses include:

- Upload a contact list for a texting platform.
- Obtain a list of households with answers for Local Use Question #1.

Due for Cert, MCA or Nutrition Visit & Local Use Question #6

Created 8.9.18

Description: A list of participants due for certification, MCA or nutrition visit (NV - benefit pick-up) during a specified time period who currently belong to the specified agency. The report output displays whether a participant has a future appointment scheduled, contact information, and the option selected for Local Use Question #6.

Columns (depending on report tab): HHID, SWID, First Name, Last Name, WIC Type, Last Set's LDTU, MCA Date, Cert End Date, Cert End Date, Appt Date, Lang-Interp. Needed?, Auth Rep's Name, Telephone 1, Comment 1, Telephone 2, Comment 2, Local Use Question #6, and Due.

Some uses include:

- Identify participants due for certs or MCAs who don't have an appointment scheduled.
- Provides contact information for reminder calls/texts and outreach.
- Provides language/interpreter needs for when scheduling appointments

Mailing Labels

Household & Participant Labels

Revised 3/17/22

Description: This report has four tabs that can be used to create labels or contact households/participants that currently belong to the specified agency and clinic(s). The tabs provide the following lists: Tab 1 – a list of all households; Tab 2 – a list of all household that have at least one currently certified member; Tab 3 – a list all participants; Tab 4 – a list of all currently certified participants. All outputs include the Clinic, Authorized Rep's Name, Mailing Address and Telephone 1 and 2 (and their Comments). All tabs include a total count and tabs 3 and 4 can be run for specified WIC Types.

Columns (depending on report tabs): Clinic ID, HHID, Address, City, State, Zip Code, Authorized Representative's Name, Telephone 1, Comment 1, Telephone 2, Comment 2, WIC Type, SWID, Participant's Name and Language.

Some uses include:

- Obtain a list of all households and participants that currently belong to the specified agency/clinic(s) regardless of certification status that can be used to create labels or contact via phone or using an auto-dialer.
- Obtain a list of all currently certified households and participants that currently belong to the specified agency/clinic(s) that can be used to create labels or contact via phone or using an auto-dialer.

Labels for Infants by Age in Days

Created: 6.12.17

Description: A list and count of infants who belong to the specified agency. The report output includes a tab for labels addressed to the authorized representative and labels addressed to "RESIDENT". Input Controls are used to specify the clinic(s) the infants currently belong to and the minimum (default value = 320) and maximum (default value = 350) age in days as of the current date.

Columns (depending on the report tabs): Clinic ID, SWID, First Name, Last Name, DOB, Age in Days, Authorized Rep, RESIDENT, Mail Address, City, State, and Zip Code.

Some uses include:

- Obtain a list of infants who are a specific number of days old for outreach and create labels for postcards (ex: send postcards to infants 10 ½ - 11 ½ months old and are nearing their first birthday).

Last Set Issued at Clinic by City Labels

Description: A list of currently certified participants, issued their last set of benefits at a specified clinic, who have one of the specified cities as the city in their mailing address. Labels can be created for households to "Resident", households to the authorized representative, participants, and participants to the authorized representative.

Columns (depending on the report tabs): City, HHID, SWID, WIC Type, Cert End Date, Last Set LDTU, Resident, Address, State, Zip Code, Authorized Representative and Participant Name.

Some uses include:

- Create household labels addressed to "Resident" for currently certified participants, issued their last set of benefits at a specific clinic, who live in one of the specified cities.
- Create household labels addressed to the authorized representative for currently certified participants, issued their last set of benefits at a specific clinic, who live in one of the specified cities.
- Create participant labels addressed to the participant for currently certified participants, issued their last set of benefits at a specific clinic, who live in one of the specified cities.
- Create participant labels addressed to the authorized representative for currently certified participants, issued their last set of benefits at a specific clinic, who live in one of the specified cities.

Last Set Issued at Clinic Labels by Language

Revised: 4.24.17

Description: A list of currently certified participants issued their last set of benefits at a specified clinic. Labels can be created for households to "Resident", households to the authorized representative, participants, and participants to the authorized representative.

Columns (depending on report tabs): HHID, SWID, WIC Type, Cert End Date, Last Set LDTU, Resident, Address, City, State, Zip Code, Authorized Representative and Participant Name.

Some uses include:

- Create household labels addressed to "Resident" for currently certified participants issued their last set of benefits at a specific clinic based on language (all, English + Others, Spanish or Somali).
- Create household labels addressed to the authorized representative for currently certified participants issued their last set of benefits at a specific clinic based on language (all, English + Others, Spanish or Somali).Create participant labels addressed to the participant for currently certified participants issued their last set of benefits at a specific clinic.
- Create participant labels addressed to the participant for currently certified participants issued their last set of benefits at a specific clinic.
- Create participant labels addressed to the authorized representative for currently certified participants issued their last set of benefits at a specific clinic.

Notes

Children with Soy on Last Benefits Issued & No “Soy Food” Note

Revised 11.20.18

Description: A list of children, issued benefits at the specified agency, who received a soy food item on their last set of benefits and do not have a “Soy Food” note, which is required documentation, within 365 days of their last set’s Last Date to use (LDTU).

Columns: SWID, Soy Food Description, Last LDTU, Most Recent Soy Rx Date, Staff – Created Soy Rx, Staff – Issued Last Set of Benefits.

Some uses include:

- Identify children issued soy foods who are missing required documentation.
- Identify staff who may require more training about soy documentation requirements

No Note Written for Certified Participants Not Physically Present at Cert

Created 11.10.20

Description: A list and count of participants certified by the specified agency during a specified time period who were not physically present at their certification and have not had a Physical Presence Exception note written within 8 days of their certification date. Provides a count of participants without notes, total certified, and percentage by agency and certifier. (NOTE: Out-of-state transfer certifications are excluded.)

Columns: HHID, SWID, Participant Name, Cert Start, Certifier, Agency Total, and counts.

Some uses include:

- Assess whether Physical Presence documentation is occurring for certified participants not physically present at their cert.

- Assess which staff may need further training to ensure correct documentation.

No Note Written for Participants Issued Benefits

Created 2.27.17

Description: A list and count of participants issued benefits at the specified agency during the specified time period who have not had a note written within 8 days of the issuance.

Columns: Clinic ID, HHID, SWID, Issued Date, WIC Type and Staff ID

Some uses include:

- Audit/monitor staff to ensure notes are written with each contact where benefits are issued if required by agency.

Note Audit

Created 1.26.17

Description: A list of participants, grouped by Staff ID, who've had a contact (cert/recert, MCA or nutrition education visit) at the specified agency during the specified time period and have had specified types of notes written (reference provided) that have a date greater than or equal to a specified number of days (input control function). The report also provides a count by staff ID and the number of days between the contact and the date of the note, the total notes written, the total number of contacts with notes written and a percentage of that total for each staff ID and the agency. Counts are provided based on appointment contacts (certs/recerts/MCAs) and Nutrition Education visits.

Columns (depending on report tabs): Notes Subject ID, Note Subject, Staff ID, SWID, Cert Start Date, Note Date, Days b/n Cert and Note, MCA Date, Days b/n MCA and Note, NE Contact Date, Days b/n NE Contact and Note, Total Notes, Total Appts, % Notes and Total NECs.

Some uses include:

- Identify staff who are taking more than a specific number of days to complete documentation for participants they've seen at certs/recerts, MCAs or nutrition visits.
- Obtain a count and percentage of notes being written late by Staff ID and for the agency.
- Obtain a list of all note subjects and their IDs.

Note Audit – More than 3 Business Days between Contact and Note

Revised 3.8.17

Description: A list and count of participants who've had a specific type of note written (reference provided) more than 3 business days after a certification, Mid-certification Assessment (MCA) or Nutrition Visit performed at the specified agency during the specified time period.

This report differs from the NOTE AUDIT report based on the following:

- Participants are only included in the report output if the note was written more than 3 business days after the contact; the NOTE AUDIT report counts calendar days and the user can use an input control to specify the number of days between the contact and note.
- A count of participants is provided at the bottom of each table grouped by staff ID; the NOTE AUDIT report provides a separate count and percentage by Staff ID and number of days late for appointments and Nutrition Education contacts.

Columns (depending on report tabs): Notes Subject ID, Note Subject, Staff ID, SWID, Cert Start Date, Note Date, Business Days b/n Cert and Note, MCA Date, Business Days b/n MCA and Note, NE Contact Date, Business Days b/n NE Contact and Note, Total Notes, Total Appts, % Notes and Total NECs.

Some uses include:

- Identify staff who are taking more than 3 business days to complete documentation for participants seen at cert/recerts, MCAs or Nutrition Visits.
- Obtain a list of all note subjects and their IDs.

Notes by Subject

Description: A list of participants who belong to the specified agency and have had one of the specified types of notes written during the specified time period. Also provides a participant count by WIC Type and type of note and a household count by type of note.

Columns: Agency, Agency ID, Note Type, SWID, First Name, Last Name, WIC Type, Note Date, Staff ID, Clinic ID and Note Subject.

Some uses include:

- Identify participants with specific types of notes written along with the staff person who wrote them for documentation or staff audits.
- Obtain a count of a type of note written during a specified time period or by WIC Type.
- Obtain a list of all note subjects and their IDs.

Specified Note(s) Not Written for Completed New Certs, Recerts, VOCs and MCAs

Created 2/23/2023

Description: A list and count (including percent) by certifier, for a specified agency and time period, of participants that haven't had a specified type of note, or notes, written within 8 days of a certification, recertification, VOC (out-of-state-transfer) or Mid-certification Assessment (MCA). A note type must be specified for each contact type in the PROMPTS. This allows the report to be run for a variety of note subjects dependent on the contact type. The Reference tab provides the Note Subject IDs.

Columns (depending on report tabs): Note Subject ID, Note Subject, HHID, SWID, WIC Type, Contact Date, Contact Type, Certifier, Agency Total, Count of: New Certs, New Certs – Not SOAP Note, Recerts, Recerts – No SOAP Note, VOCs, VOCs – No SOAP Note, MCAs, MCAs – No SOAP Note, Total Contacts, Total No Notes and % No Notes.

Some uses include:

- Identify staff not completing documentation requirements.
- Obtain count and percentage of total contacts without appropriate documentation.

Nutrition Education

3 or 6 Month Infant Contacts

Revised 8.12.19

Description: A list of currently certified infants, who belong to the specified agency and whose age is currently either between 4-5 months or 7-8 months. Infants are only included in the output if they, or their mothers for fully-breastfed infants less than 6 months old, have been issued benefits with a Last Date to Use (LDTU) after the current date. An OPTIONAL input control allows the report output to be filtered by Clinic ID.

Columns (depending on report tabs): Clinic ID, HHID, SWID, DOB, Approx. 3 Mo Birthday, Approx. 6 Mo Birthday, Current Age and Cert Date.

Some uses include:

- Identify infants that should have 3 or 6 month nutrition education contacts to audit.

Due for Additional Education Contact

Created: 10.10.17

Description: A list of participants who currently belong to the specified agency and whose Last Date to Use (LDTU) occurs during the specified time period. The output also provides both household and participant labels. The intent is to identify households that may be eligible for alternative forms of nutrition education. Therefore, this report output differs from the due for benefit pick-up report because it excludes participants that belong to households with other members who are due for a cert/recert, who have appointments within 30 days of the last set's LDTU and/or who are high risk. It also includes fully breastfed infants less than 6 months of age and some-breastfeeding women more than 6 months postpartum since they require an additional nutrition education contact even though they are not issued benefits.

Columns (depending on report tabs): HHID, SWID, Last Set's LDTU, Next Appt, Participant's Name, Authorized Rep's Name, Telephone #, MCA Due Date, Cert End Date, WIC Type, DOB, Lang., Interp. Needed, Clinic ID, Mailing address, City, State, and Zip Code.

Some uses include:

- Identify households and participants that may be eligible to receive alternate forms of additional nutrition education.

Goal Contacts

Description: A list of currently certified participants who belong to the specified agencies who have a goal contact (without a goal result) during the specified time period. If the participant has more than one goal contact during the specified time period, only the most recent goal displays.

Columns: Agency, Agency ID, Clinic ID, HHID, SWID, Last Name, First Name, DOB, Goal, Goal Results, Contact Date and WIC Type.

Some uses include:

- Assess whether specific goals are being set (if certain nutrition education initiatives).
- Identify participants who haven't had the goal documentation completed with a goal result.

Goal Contacts & Results

Created: 2.28.17

Description: A list of participants who belong to the specified agency and have a goal contact recorded in the Nutrition Education tab during the specified time period. The report output indicates if the goal has a goal result and the staff who entered the initial goal contact and the goal result.

Columns: Clinic ID, HHID, SWID, WIC Type, Goal Date, Staff-Goal, Goal, Goal Results Date, Staff-Goal Result and Goal Result.

Some uses include:

- Tracking and monitoring goals and goal result follow-up.

Materials Given

Created: 4.16.18

Description: A list of participants who belong to the specified agency and received specified education materials during a specified time period. The Reference tab provides a list of materials IDs and descriptions (Materials IDs must be entered in to a PROMPT and are required to run the report). An OPTIONAL input control filters the report output by WIC Type

Columns (depending on report tab): Material ID, Materials (Description), WIC Type, Active, Participant Name, HH ID, SWID, WIC Type, Date Given, Count and Count (All).

Some uses include:

- Track whether specific education materials are being provided and to whom.

Materials Given at Cert

Created: 2.26.19

Description: Provides a list and count of participants who were certified at the specified agency during the specified time period and whether or not they received the specified materials as indicated by documentation of the Material(s) Given in the Nutrition Education tab. The output also includes a count and percentage of participants by agency, clinic and staff who have and have not received the specified material(s) at certification. Tab 1 – Reference provides the Material IDs necessary to run this report. This template has an optional Input Control that can be used to filter the report output by WIC Type.

Columns (depending on report tab): Material ID, Name, WIC Type, Active, Staff Name, Cert Date, Clinic ID, SWID, WIC Type, and Materials Given.

Some uses include:

- Ascertain whether participants are receiving specified material(s) at certification.
- Assess which staff are providing the specified material(s) at certifications.
- Obtain a count and percentage of participants receiving the specified material(s) when certified by agency, clinic and staff.

Nutrition Education Contacts

Revised: 8.29.17

Description: A list and count of participants who belong to the specified agency and have at least one of the specified Nutrition Education (NE) topics documented during the specified time period. The first two tabs of the report output are references that provide the NE topic codes necessary to run this report.

Columns (depending on report tabs): WIC Type, Topic Code, Primary Nutrition Education Topics, Secondary Nutrition Education Topics, HHID, SWID, First Name, Last Name, DOB, WIC TYpe, Contact by Staff, and Contact Date.

Some uses include:

- Assess whether specific nutrition contacts are being provided (if certain nutrition education initiatives) and the staff who are providing them.
- Obtain a count of participants receiving different type of education contacts.
- Obtain a list of all primary and secondary nutrition topics, the codes and the WIC Types associated with them.

WICHealth.org Contacts

Created 2.10.21

Description: Provides a statewide count by agency of the group topics for WICHealth.org documented in the Nutrition Education (NE) section of the MN Information System (MIS) during the specified time period. It also provides a list of participants who belong to the specified agencies with a contact during that same time period.

Columns (depending on report tabs): Agency Name, Household Count, Agency ID, HHID, SWID, WIC Type, Cert Start, Cert End, Last LDTU, Contact Date, and Description.

Some uses include:

- Identify participants with a completed wichealth.org lesson.
- Assist with assessing completion of NE contact prior to benefit issuance.
- Allow state to assess whether auto-insertion of the WICHealth.org contact improves the utilization of WICHealth.org for NE.

One Call: Children Who Haven't Returned to WIC

Created: 5.3.17

Description: This report template is for agencies participating in the One Call automated notification project and utilizing the Local Use Question in Position 6 (LUQ6) on the Demographics – AdditionalInfo1 tab. The report output provides a list and count of children, between 1 and 5 years old as of the current date, who belong to the specified agency, are no longer certified (Cert End Date within last 8 months), and haven't received benefits in more than 3 months. Children are included if the selection for LUQ 6 indicates that they want to participate in the One Call notification system. Tab 1 – Reference provides the Value ID for LUQ6, which must be entered into the PROMPT, and its corresponding answer.

Columns (depending on report tab): Value IDs for Local Use Question #6 (Children Only), Answers for Local Use Question #6, Firstname, Lastcheckldtu, Certificationduedate, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid and Authrepfirstname.

Some uses include:

- Provide a list of children for outreach, in order to improve retention, using the One Call automated notification system.

One Call: Currently Certified Participants without Opt In Selected

Created: 8.13.16

Description: A list and total count of currently certified participants who belong to the specified agency and do not have "Opt In" selected for Local Use Question in Position 6 to indicate interest in being contacted by One Call Now messaging.

Columns: Household ID, State WIC ID, First Name, Last Name, WIC Type, Last Set's LDTU, Cert Start Date, Cert End Date, and Description.

Some uses include:

- Identify currently certified participants who do not have "Opt In" selected.

- Obtain a count of currently certified participants that do not have "Opt In" selected.

One Call: Due for Nutrition Visit

Description: A list of participants who belong to the specified agency, and want to be notified by One Call, who are due to pick up benefits based on having a last set's Last Date to Use (LDTU) during the specified time period. The report output excludes participants, and household member of participants, with appointments during the specified time period.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, First Name, Lastcheckldtu, Certificationduedate, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid and Authrepfirstname.

Some uses include:

- Identify participants who have agreed to be contacted by One Call and are due to pick up benefits during the specified time period.

One Call: Farmers' Market Note

Description: A list of households, with members that belong to the specified agency and at least one of whom wants to be notified by One Call, who had a Farmers' Market note created during the specified time period.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Authrepfirstname, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2 and Householdid.

Some uses include:

- Identify households who have agreed to be contacted by One Call who have a Farmer's Market note – reminder calls/texts to use Farmer's Market benefits before they expire.

One Call: Future Appointments with Authorized Rep's Name

Revised 12.10.19

Description: This report is for agencies participating in the One Call automated messaging project and utilizing the Local Use Question (LUQ) in Position 6.

The first column in the output is the authorized rep's first name and the language (not its code) displays. The output does not display the participant's name.

A list of participants who belong to the specified agency, and want to be notified by One Call, who have a future appointment scheduled during the specified time period. Appointments can be filtered in two different ways: an optional Input Control allows the user to filter the output by the appointment description or the Appointment Type ID is included and can be used to identify the types of appointments One Call should contact.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Appointment Type ID, Long Descriptions for Appointment Types, Authrepfirstname, Appointmentdate, Appointmentime, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid, Appointmenttypeid, and Description.

Some uses include:

- Obtain a list, with the authorized rep's name first name, for One Call Now messaging service of participant with future appointments.

One Call: Future Appointments with Participant's First Name

Revised 10.22.19; 12.10.19 (previously One Call: Future Appointments – REVISED OCT 2019)

Description: This report is for agencies participating in the One Call automated messaging project and utilizing the Local Use Question (LUQ) in Position 6.

The first column in the output is the participant's first name; the last column is the Authorized Rep's first name. The output also displays the code for each language instead of the language itself.

The output provides a list of participants who belong to the specified agency, and want to be notified by One Call, who have an appointment scheduled during the specified time period. The Reference tab provides the IDs for Local Use Question #6, necessary to complete the PROMPTS. An OPTIONAL Input Control allows the report user to filter the report for specific appointment types.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Appointment Type ID, Long Descriptions for Appointment Types, Firstname, Appointmentdate, Appointmentime, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language2, Statewicid, Householdid, Appointmenttypeid, Description, Language1, and Authrepfirstname.

Some uses include:

- Obtain a list, with the participant's first name, for One Call Now messaging service of participant with future appointments.

One Call: Household Members without Opt In Selected or "Text" in Comment 2

Description: This report is based on households who belong to the specified agency and have at least one member who has had "Opt In" selected for One Call Now messaging during the specified time period. The output provides two different lists. 1) A list of members in those households who do not have "Opt In" selected. 2) A list of members in those households who do not have "text" entered into the Telephone Comment 2 field (excludes those with email address or languages other than English or Spanish selected).

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Household ID, State WIC ID, First Name, Last Name, WIC Type, Last Set LDTU, Cert Start Date, Cert End Date, and Comment 2.

Some uses include:

- Identify household members who do not have "Opt In" selected despite at least one other member of the household having "Opt In" selected.
- Identify household members who do not have "text" in the Telephone Comment 2 field despite either having "Opt In" selected or having other members of the household with "Opt In" selected. (Excluding those that meet criteria for email or voice.)

One Call: Missed Appointments

Description: A list of participants who belong to the specified agency, and want to be notified by One Call, who have missed an appointment scheduled during the specified time period. The Appointment Type ID (reference provided) is included so that agencies can determine which type of appointments One Call should contact.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Appointment Type ID, Long Descriptions for Appointment Types, Firstname, Appointmentdate, Appointmenttime, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid, Appointmenttypeid and Authrepfirstname.

Some uses include:

- Identify participants who have agreed to be contacted by One Call who have missed an appointment during the specified time period.

One Call: Missed Appointments with No Future Appts Scheduled

Revised 2.1.16

Description: A list of participants who belong to the specified agency, and want to be notified by One Call, who have missed an appointment scheduled during the specified time period and do not have a future appointment scheduled (appointment date after the current date). The report also provides household information for the same participants that excludes individual information such as Appointment Date/Time, State WIC ID, etc. The Appointment Type ID (reference provided) is included so that agencies can determine which type of appointments One Call should contact.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Appointment Type ID, Long Descriptions for Appointment Types, Firstname, Appointmentdate, Appointmenttime, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid, Appointmenttypeid and Authrepfirstname.

Some uses include:

- Identify participants who have agreed to be contacted by One Call who have missed an appointment during the specified time period and do not have a future appointment scheduled.
- Obtain the same list but at a household level.

One Call: Missed Nutrition Visit

Description: A list of participants who belong to the specified agency, and want to be notified by One Call, who have missed a nutrition visit (benefit pick-up) based on having a last set's Last Date to Use (LDTU) during the specified time period. This report excludes participants based on the date entered into the *Enter Missed Appts Start Date* PROMPT, which should be the same date as entered into the *Enter Last LDTU Start Date* PROMPT. These are participants that had an appointment scheduled between that date and the current date and are excluded from this report since they should display on the One Call: Missed Appts report.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Firstname, Lastcheckldtu, Certificationduedate, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid, and Authrepfirstname.

Some uses include:

- Identify participants who have agreed to be contacted by One Call who have missed a nutrition visit (benefit pick-up) and do not have a missed appointment.

One Call: Roster

Description: A list of participants who belong to the specified agency, and want to be notified by One Call, who answered the Local Use Question #6 during the specified time period.

Columns (depending on report tabs): Value IDs for Position 6, Answers to Local Use Question #6, WIC Type, Firstname, Servicesiteid, Telephone1, Telephone2, Comment2, Emailaddress, Language1, Language2, Statewicid, Householdid, Wicstatus, Answerdate and Authrepfirstname.

Some uses include:

- Identify participants who have agreed to be contacted by One Call based on when the Local Use Question was answered.

Outreach/Retention

Average Number of Months & Years Children Were Served by WIC

Created 11.10.16

Description: This report provides the average number of months and years children born during a specified time period were served by the MN WIC Program. The average is based on the total number of participation months a child was counted for divided by the total number of children born during the specified time period. Children are counted at the agency where they were last certified.

Columns: Agency Name, Agency ID, Total # of Participation Months, Total # of Children Served, Average # of Months Served, and Average # of Years Served.

Some uses include:

- Obtain the average length of participation in the MN WIC Program for children born during a specified time period and compare statewide.
- Provide information for the Hunger Impact grant application.

Children Who Haven't Returned to WIC

Revised 3.7.17

Description: A list and count of children, between 1 and 5 years old as of the current date, who belong to the specified agency (or agencies), are no longer certified (Cert End Date within last 8 months), and haven't received benefits in more than 3 months. The report also provides a count and percentage of total by Race/Ethnicity or Cultural Identity and Age Category for the specified agencies and the State, along with a count and percentage by Age Category and clinic. Note that this report uses an Input Control as an **optional** filter whereby Tab 1 – List can be run for all, multiple or specific Race/Ethnicities or Cultural Identities.

Columns: Agency, Agency ID, Clinic ID, HHID, SWID, Last Name, First Name, DOB, Age as of Last Set's LDTU, Current Age, Cert End Date, Last Set's LDTU, Authorized Rep's Name, Telephone #, Race Ethnicities or Cultural Identities, count and percentages by age category and Race/Ethnicities or Cultural Identities (agency, clinics, and state).

Some uses include:

- Improve retention by identifying children who have not returned to WIC for outreach.
- Identify age groups where further outreach may be required.
- Identify Race Ethnicities or Cultural Identities where further outreach may be required.
- Obtain a count and percentage of total by age groups for specified agencies and as compared to the State.
- Obtain a count and percentage of total by Race/Ethnicities or Cultural Identities for specified agencies and as compared to the State.
- Provide data for the Hunger Impact Grant application.

Households with a Currently Certified Member and Specified Address

Created 2.7.17

Description: A list and count households, with at least one currently certified participant, who belong to the specified agencies and have all or part of the specified address(es) in the Address field in Demographics.

Columns: Agency Name, Agency ID, Household ID, Address, City, State, Zip Code, Mail Address, Mail City, Mail State, and Mail Zip Code.

Some uses include:

- Assess addresses for concentration of WIC households for clinic sites.
- Identify households with PO Box for the physical address.

Households with Currently Certified Member and Members Potentially Eligible for Certification

Description: A list of households with a currently certified member that belongs to the specified agency and has another infant or child in that household that is not currently certified and potentially eligible to be.

Columns: HHID, SWID, Last Name, First Name, WIC Type, DOB, Age, Cert End Date, Cert Agency ID, Cert Clinic ID, Current Agency ID and Current Clinic ID.

Some uses include:

- Improve caseload by identifying infants/children previously on WIC that have another household member already on WIC and could be eligible for certification.

Households with Email Address and No Active Members

Created 6.5.18

Description: Provides a list of households with at least one member certified at the specified agencies, who was terminated within the past 15 months (for any reason), that have email addresses and no active members.

Columns: HHID and Email Address.

Some uses include:

- Obtain list of households for outreach survey to assess why no longer on WIC.

My MN WIC App – Count of Households with Currently Certified Member Belonging to Registered Households by Language

Revised 5.20.19

Description: This report provides a count and percentage of households with at least one currently certified member, belonging to the specified agency, and registered for the My MN WIC App by language.

Columns: Count of Registered Households by Language, Count of Households with One Currently Certified Member, % Registered, AGENCY TOTAL, and Language

Some uses include:

- Assess the languages spoken by registered households.
- Obtain a total count of households with at least one currently certified member, a total count of registered households and the percentage registered for the My MN WIC App for a specified agency.

My MN WIC App – Currently Certified Participants Belonging to Registered Households by Cultural Identity or Race/Ethnicity

Revised 5.20.19

Description: This report provides a count and percentage of currently certified participants that belong to the specified agency and to households registered for the My MN WIC App by Cultural Identity or Race/Ethnicity.

Columns: Count of Currently Certified Participants Belonging to Registered HHs, Count of Currently Certified Participants, % Registered, AGENCY TOTAL, Race/Ethnicity or Cultural Identity.

Some uses include:

- Assess the Cultural Identity or Race/Ethnicity of currently certified participants that belong to a household registered for the My MN WIC App.
- Obtain a percentage of currently certified participants that are registered for the My MN WIC App.
- Obtain a count of participants certified until on or after the last date of the current month.

My MN WIC App – Households Not Registered

Created 5.28.19

Description: This report provides a list of households that belong to the specified agency, with at least one currently certified member, and are not yet registered for the My MN WIC App. An optional Input Control allows the report to be filtered by Clinic ID.

Columns: Clinic ID and Household ID.

Some uses include:

- Obtain a total count of households not yet registered for the My MN WIC App for a specified agency or by clinic.
- Identify households not yet registered for the My MN WIC App for a specified agency by clinic.

My MN WIC App – Statewide Count and Agency List of Registered Households

Revised 5.20.19

Description: This report provides an agency list of all households registered for the My MN WIC App and a statewide count of households registered for the My MN WIC App by agency.

Columns (depending on tab): Clinic ID, Household ID, Date Registered, Agency and Count of Registered Households.

Some uses include:

- Obtain a total count of households registered for the My MN WIC App for the state and by agency.
- Obtain a list of households registered for the My MN WIC App for a specified agency by clinic and date registered.

Participants with Specified Address

Created 4.28.16

Description: This report provides two different lists of participants whose last set of benefits were issued by the specified agency and whose address contains the partial address specified in the PROMPT. The first list is of participants who currently belong to the specified agency. The second list is of participants who currently belong to Agency 88 and whose most recent cert ended in the last year.

Columns (based on report tabs): HHID, SWID, First Name, Last Name, Address, Cert End Date, Clinic – Last Set Issued, Last Set LDTU, WIC Type and Current Agency ID.

Some uses include:

- Identify participants with a specified address for outreach/contact (such as an apartment building).
- Assess area for WIC participant concentration for clinic sites.

Retention – Infants and Children Dropped Off & Returned to MN WIC within One Year (Percent by Certified)

Created 3.19.19

Description: This report provides statewide and agency counts and percentages of infants and children certified during the specified time period who dropped off WIC, dropped off and did not return within one year of dropping off, dropped off and returned within one year, and the average number of months before returning. The output includes totals, by age category, by race/ethnicity, and by cultural identity or race ethnicity. All percentages are based on the total number certified for each row. An optional Input Control allows the report user to limit the output to the state and specific agencies.

Some uses include:

- Use the *AVE # MO BEFORE RETURN* as a possible quality improvement measure (is the number of months before return increasing/decreasing over time).
- Assess drop-off and return rates for infants and children certified during the specified time period by age category, race/ethnicity and cultural identity for a specific agency and statewide.
- Compare drop-off and return rates statewide and to other agencies.
- Compare the average number of months before returning statewide and to other agencies.
- Use to improve retention/participation by reviewing clinical practices and outreach to subgroups that stand out in the report.

Statewide Count of Children Returned to WIC

Created 4.15.20

Description: A statewide count by agency of children certified during a specified time period whose previous cert was terminated due to failure to pick-up or certification expired. The child is counted at the agency where the **terminated** cert was performed. (NOTE: This report will time-out if run for time periods greater than one month due to the number of statewide cert records it must review for the output. It was designed to be run for a specific month.)

Some uses include:

- Assess if the number of children returning to WIC is impacted by outreach, economic events (such as COVID-19), etc.

Terminated for Failure to Pick-up

Revised 6.12.17

Description: A list and count of participants who belong to the specified agency and whose most recent certification was auto-terminated for Failure to Pick-up during the specified time period. This report also provides a count by Race/Ethnicity and Cultural Identity by WIC Type for the specified Agency, its Clinics and the State. A percentage of the total is provided for each Race/Ethnicity and Cultural Identity for the specified Agency and State. Note that this report uses an Input Control as an **optional** filter whereby Tab 1 – List can be run for all, multiple or specific Race/Ethnicities or Cultural Identities.

Columns: Clinic ID, HHID, SWID, Last Name, First Name, WIC Type, DOB, Cert Start Date, Cert End Date, Last Set's LDTU, Term Date, Authorized Rep's Name, Telephone #, and Race/Ethnicity or Cultural Identity.

Some uses include:

- Improve retention by identifying participants who haven't returned to pick up benefits.
- Identify specific Race/Ethnicities or Cultural Identities that may be failing to pick up benefits.

- Identify whether a higher percentage of a specific Race/Ethnicity or Cultural Identity may be failing to pick up benefits.
- Obtain a count of participants terminated for Failure to Pick-up Race/Ethnicity/Cultural Identity, and WIC Type for the specified Agency, its Clinics and the State.

Participants

Certified Participants

Revised 8.14.17 (Previously entitled Certified Participants by WIC Type)

Description: A list and count of participants certified at the specified agencies during the specified time periods. The output includes a list of new certifications and recertifications, and a combined list of all certifications. It also provides counts by WIC Type and Race Ethnicity or Cultural Identity. OPTIONAL input controls have been added to allow the user to filter all of the report tabs by WIC Type and/or clinics.

Columns (depending on report tabs): Agency, Agency ID, HHID, SWID, First Name, Last Name, DOB, M/F, Prescreen Date, Cert Date, RC or New?, WIC Type, High Risk, Certifier, Race/Ethnicity or Cultural Identity, and Clinic ID.

Some uses include:

- Identity participants certified during a specified time period at a specific clinic or by specific WIC Type.
- Obtain a list and count of new participants.
- Obtain a count of certifications, new certification and recertifications performed during a specified time period at specified agencies.

Certified Participants by Specified City of Residence

Created 7.5.16

Description: A list and total count of participants certified at the specified agencies during the specified dates who currently live in the specified cities. Labels can be created addressed to the authorized representative.

Columns: Agency ID, Agency Name, City of Residence, Belongs to Agency, HHID, SWID, WIC Type (current), Last LDTU, Last Appt, Cert Start, Cert End, Mail Address, Mail City, Mail State, Mail Zip, Telephone #, Auth. Rep's Name, Term Date, Term Reason, Ineligible Date and Ineligible Reason

Some uses include:

- Perform outreach to participants who live in specified cities.
- Obtain number of participants certified during a specified time period who currently live in a specified city.

Certified Participants with Address at Time of Cert

Created 1.23.20

Description: A list of participants certified at the specified agency during the specified time period. The output displays the residential address, city, and zip code where the participant lived at the time the certification was performed. The output also includes a count of participants and households by city and clinic and agency. An OPTIONAL input control allows the report user to filter the output by clinic.

Columns (depending on tab): HHID, SWID, WIC Type, Cert Date, Address (at Time of Cert), City, State, Zip Code, Clinic ID, Participant Count, Household Count, Clinic Total, and Agency Total<

Some uses include:

- A list of certified participants with addresses at the time of their cert – potentially used for geo-coding or mapping.
- Obtain a count of participants and households by city and clinic or for the agency.

Currently Certified Participants by WIC Type

Revised 12.30.15

Description: A list of currently certified participants, based on specified WIC Type, who belong to the specified agency. Also provides a total count of participants.

Columns: HHID, SWID, First Name, Last Name, WIC Type, DOB, Cert End Date, Last LDTU, Authorized Rep's Name, Telephone #, Language, Interpreter Needed, Address, City, State and Zip Code.

Some uses include:

- Obtain a list of currently certified participants by WIC Type.
- Create labels for currently certified participants.
- Obtain a total count of currently certified participants by WIC Type.

Participant List for Specified Participation Month & Agency

Created 3.1.17

Description: A list of participants who were counted at the specified agency for the specified participation month(s). The report output includes date of birth, address and race/ethnicity.

Columns: HHID, SWID, WIC Type, DOB, Address, City, State, Zip Code and Race/Ethnicity.

Some uses include:

- Identify participants for GIS or census reporting.
- Obtain list of participants counted for specified participation month by WIC Type, address and/or race/ethnicity.

Program Participant Characteristics

Created 9.13.16

Description: Provides unduplicated statewide counts, and unduplicated counts and a list of participants for the specified agency, for the specified time period. The agency counts are based on the agency where participants were first counted during the specified time period. The unduplicated counts include: households, participants and participants by gender, age category, ethnicity, race, and type of health insurance.

Columns (depending on report tabs): Counts (statewide and specified agency) by household, participants, gender, age category, ethnicity, race, insurance type, HHID, SEID, First Name, last Name, MI, DOB, Address (residential), City, State, Zip Code, County, Gender, Race, Ethnicity and Insurance Type.

Some uses include:

- Obtain an unduplicated count of the number of households and participants for a specified agency.
- Obtain an unduplicated count of the number of households and participants for the state.
- Obtain an unduplicated count of participants by gender, age category, ethnicity, race and/or type of health insurance for a specified agency.
- Obtain an unduplicated count of participants by gender, age category, ethnicity, race and/or type of health insurance for the state.
- Obtain an unduplicated list of participants for a specified agency.

Statewide Count of New Participant Certifications and Recertifications by WIC Type and Race/Ethnicity

Created 6.8.20

NOTE: ***This template replaces the Statewide Count of Newly Certified Participants by WIC Type and Race/Ethnicity since tabs 2 and 5 (New Certs) provide the same information.***

Description: A statewide count of all certifications, newly certified participants, and recertifications completed by agencies during the specified time period. Counts are provided both by WIC type and Race/Ethnicity.

Columns/Rows (depending on report tabs): MINNESOTA WIC PROGRAM, Agency, WIC Type, Race/Ethnicity and TOTAL.

Some uses include:

- Obtain a total count of "brand new" participants certified during a specified time period by agency and for the state by WIC Type and Race/Ethnicity.
- Obtain a total count of recertifications performed during a specified time period by agency and for the state by WIC Type and Race/Ethnicity.

- Obtain a total count of all certifications performed during a specified time period by agency and for the state by WIC Type and Race/Ethnicity.

Statewide Totals for New Certs and Recerts by WIC Type and Calendar Year – Waiver Reporting by State Office

Created 3.1.21

Description: A statewide total count of new certifications and recertifications by WIC Type for a specified calendar year.

Columns/Rows (depending on report tabs): Total Enrolled, Total Women, Pregnant, Partially Breastfeeding, Fully Breastfeeding, Postpartum, Total Infants, Total Children, Month/Year, Totals for CY <Year>

Some uses include:

- This report was created in response to a Federal requirement for Waiver Reporting by the State Office.
- Total count of "brand new" certs and recerts for women, pregnant women, partially breastfeeding (Mostly and Some-BF), fully breastfeeding, postpartum (non-BF), infants and children for a calendar year (or month).

Unduplicated Calendar, Federal and State Fiscal Year Participant Lists and Statewide Counts

Created 6.9.20

Description: Participant lists for Calendar (January 1 – December 31), Federal (October 1 – September 30) and State (July 1 – June 30) by specified fiscal year for the specified agency. The output also provides statewide unduplicated counts for participants and households by agency. An OPTIONAL Input Control allows the participant lists to be filtered by WIC Type.

Columns/Rows (depending on report tabs): Clinic ID, HH ID, SWID, DOB, WIC Type, Address (Mail), City, State, Zip Code, Auth Rep's Name, Telephone 1, Comment 1, Telephone 2, Comment 2, Calendar Year Count, Federal Fiscal Year Count and State Fiscal Year Count.

Some uses include:

- Obtain an unduplicated list of participants served by the specified agency based on a specified fiscal year for calendar, federal and state fiscal years.
- Obtain an unduplicated count of participants by agency for a specified calendar, federal and state fiscal year.
- Obtain an unduplicated count of household by agency for a specified calendar, federal and state fiscal year.

Participants – Breastfeeding Women

BF Women Issued at Least 7 Months of Benefits During Most Recent Cert by Language

Created 8/1/2022

Description: A list of breastfeeding women, certified after a specified date, who were issued benefits at the specified agency for at least 7 months. The report output includes an OPTIONAL Input Control to filter the output by Language (the default setting is to filter out English).

Columns: Agency ID, Clinic ID, HHID, SWID, First Name, Last Name, DOB, WIC Type, Race/Ethnicity, Language, Telephone, Mail Address, Mail City, Mail State, Mail Zip Code, Residential Address, Residential City, Residential State, Residential Zip Code, Cert Start Date, Actual Delivery Date, and # of Months Benefits Issued.

Some uses include:

- Identify potential bilingual peers based on breastfeeding participants issued benefits for more than 7 months of their certification.
- Identify women who breastfed more than 6 months for congratulatory contacts.

BF Women Issued Benefits

Description: A list of breastfeeding women, by Breastfeeding Amount, who were issued benefits at the specified agencies during the specified time period.

Columns (depending on report tabs): HHID, SWID, Current Agency ID/Clinic ID, BF Amount, Issued Date, Last Set's LDTU, Cert Start Date, Cert End Date, Issuing Clinic, Agency ID, Clinic ID, First Name, Last Name, Address, City, State and Zip Code.

Some uses include:

- Obtain a list of participating breastfeeding women by specific breastfeeding amount.
- Identify breastfeeding women recently issued benefits for contact/BF promotion.
- Create labels for outreach/congrats postcards, etc.

Currently Certified BF Women

Description: A list of currently certified breastfeeding women who belong to the specified agencies. The output includes race/ethnicity and cultural identity (if selected) and address information for labels.

Columns (depending on report tabs): Agency Name, Agency ID, SWID, First Name, Last Name, Cert Date, Cert End, BF Amount, Ethnicity, Race, Cultural Identity, Address, City, State, and Zip.

Some uses include:

- Obtain a list of currently certified breastfeeding women.
- Identify currently breastfeeding women by amount breastfeeding (can sort list in Excel by Amount BF column).

- Identify currently breastfeeding women by ethnicity, race, or cultural identity.
- Obtain a total count of currently certified breastfeeding women.
- Create labels for outreach/congrats postcards, etc.

Some-BF Women 8-11 Months Postpartum

Description: A list of some-breastfeeding women, counted at the specified agency, who are between 8 to 11 months postpartum as of the specified participation month.

Columns: SWID, Actual Delivery Date, Date Record Created (date EOM run) and Approximate # of Months Postpartum.

Some uses include:

- Assist with auditing participant records to ensure the required Nutrition Education contacts are be provided to some-bf women who are no longer receiving benefits.

Participants – Children

All Children Born between Specified Dates

Description: A list of all children who belong to the specified agencies and were born between the specified dates (regardless of certification status).

Columns (depending on report tabs): Agency ID, HHID, SWID, DOB, Age, Cert Date, Cert End Date and Clinic ID.

Some uses include:

- Obtain a list of children by age.

Children 3-5 Years Old as of Specified Date*

Description: A list of children who belong to the specified agency and will be 3-5 years olds as of the specified date. The report also provides a count by current city of residence. (*NOTE: the specified date has to be entered into the SQL by the State Office.)

Columns: City, HHID, SWID, First Name, Last Name, DOB, Age on <Date>, Address (full address) and Telephone #.

Some uses include:

- Outreach for city programs to children who would be 3 to 5 years old (i.e at the beginning of the school year).

Participants – Infants

Certified Infants with Subsequent Issuance at Other Agency

Description: This report provides two different lists. The first is a list and count of infants certified at the specified agency, during a specified time period, who were issued benefits by another agency within 120 days of their cert date. The second is a list and count of infants whose first certification occurred at the same specified agency during the same specified time period.

Columns (depending on report tabs): HHID, SWID, WIC Type at Cert, Certifying Agency ID, Cert Date, Subsequent Issuance Date, Agency where Subsequent Benefits Issued, Infant's State WIC ID, DOB, Cert Date, and Mom's State WIC ID.

Some uses include:

- Identify if trend of participants being seen for certs but routinely going to other agencies for further services.
- Obtain list of infants new to the WIC program.

Participants – Infants & Children

Currently Certified Infants & Children by Age

Revised 7.31.17

Description: A list and counts of currently certified infants and children who belong to the specified agency. The participant lists are broken into 6-month age categories (0-5 Months, 6-12, 13-18, 19-24, 25-30. 31-36. 37-42, 43-48, 49-54, 55-60), grouped by clinic, and contain general demographic information including authorized reps and addresses that can be used to create labels. The counts are provided for the agency and for each clinic by month and 6-month age categories. Ages are calculated based on the difference between their date of birth and the current date.

Columns (depending on report tabs): Clinic, HHID, SWID, First Name, Last Name, Gender, DOB, Age (in Months), WIC Type, Race/Ethnicity or Cultural Identity, Cert End Date, Authorized Rep's Name, Telephone, Mail Address, Mail City, Mail State, Mail Zip Code, Clinic ID, Agency ID, Count by Age in Months, Count by Age in 6 Month Increments, Agency Total, Agency Total by Clinic, Count by Age in Months by Clinic, and Count by Age in 6 Month Increments by Clinic.

Some uses include:

- Obtain a list of infants/children by age (in months as of the current date) – do outreach/education/audits, etc. based on age group.
- Obtain a count of currently certified infants/children by age.
- Create labels for infants/children based on age.
- Provide information for Hunger Impact Grant Application.

Participants – Postpartum Women

Postpartum Women & Their Two-Way Linked Infants

Description: A list and count of women and their infants who belong to the specified agency and have an Actual Delivery Date (ADD)/Date of Birth (DOB) during the specified time period. If a two-way link does not exist between mom and infant's record then only the woman displays on the report output.

Columns: First Name, Last Name WIC Type, DOB, SWID and HHID.

Some uses include:

- Obtain a list of postpartum women and their infants based on the baby's DOB or mom's ADD.
- Identify women who potentially do not have a two-way link to their infant's records.

Participants – Pregnant Women

Certified First-Time Pregnant Women

Created 5.15.17

Description: A list of first-time pregnant women certified at the specified agency during the specified time period. The report also provides a count by age as of the date the women were certified and clinic and by cultural identity or race/ethnicity and clinic.

Columns (depending on the report tabs): Clinic ID, HHID, SWID, DOB, Age at Cert, LMP Start Date, Weeks Gest at Cert, Cert Start Date, , # of Previous Pregnancies, and Cultural Identity or Race/Ethnicity.

Some uses include:

- Obtain a list of first-time pregnant women for referral or outreach purposes.
- Obtain a count of first-time pregnant women by agency and clinic.
- Identify first-time pregnant teenagers by age and clinic.
- Identify first-time pregnant women by specified cultural identity or race/ethnicity.

Currently Certified Pregnant Women by Age & Race/Ethnicity – Agency & State

Created 4.13.16

Description: A snapshot count of currently certified pregnant women who belong to the specified agencies by age as of the report run date, age group (14 and under, 15-17, 18-19, 20-

21, 22-24, 25-29, 30-34, 35-39, 40 and over) and race/ethnicity. This report also provides state totals and a list of participants for the specified agencies.

Columns (depending on the report tabs): Agency, Agency ID, HHID, SWID, DOB, Age, EDD/EDC, Cert End Date, Race/Ethnicity and Clinic ID.

Some uses include:

- Assess if any age and race/ethnicity trends for currently certified pregnant women.

First-Time Pregnant, New to WIC, 19 and Older by Clinic

Revised 11.28.17

Description: A list and count of first-time pregnant women who belong to the specified agency and were certified during the specified time period, grouped by clinic. The women must be both new to WIC and 19 years old or older as of the date the report is run to be included in the output. Tab 1 has an OPTIONAL input control to allow the report user to limit the output to specific clinics. Tab 2 provides a count by clinic and race/ethnicity or cultural identity.

Columns (depending on the report tabs): Clinic ID, SWID, DOB, Age (at Cert), LMP Start Date, Weeks Gest. (at Cert), Cert Date, Prescreen Date, # of Prev. Preg. and Race/Ethnicity or Cultural Identity.

Some uses include:

- Identify a specific sub-set of participants for referral purposes.

First-Time Pregnant Women and First-Born Infants (recent time period)

Revised 11.28.17

Description: This report provides lists, counts and percentages for two distinct groups of participants that belong to the specified agency: 1) first-time pregnant women whose Expected Delivery Date falls within the specified time period and 2) first-born infants whose Date of Birth falls within the same time period. It also provides a count and percentage for the state and each agency for both groups of participants.

Columns (depending on the report tabs): Agency, Agency ID, Count of Pregnant Women Certified, Count and Percentage of First-Time Pregnant Women, HHID, SWID, Cert Date, Participant's Name, EDD, Race/Ethnicity or Cultural Identity, Expecting Multiples?, Telephone #, Count of Infants Born, Count and Percentage of First-Born Infants, Infant's DOB, Infant's Name and Authorized Rep's Name.

Some uses include:

- Obtain a list of first-time pregnant women for referral purposes.
- Compare percentages of first-time pregnant women to state and other agencies - assess referral/outreach initiatives.

- Obtain a list of first-born infants – identify households with new moms for referral purposes.

Pregnant Women by Expected Delivery Date

Revised 10.29.18

Description: A list and count of pregnant women who belong to the specified agencies and whose Expected Delivery Date is during the specified time period. The report also provides a count of pregnant women by clinic.

Columns (depending on the report tabs): Agency ID, Clinic ID, HHID, SWID, EDD/EDC, Weeks Gest. at Cert, Age at Cert, Exp. Mult., Next Appt Date, First Name, Last Name, Telephone #, Comment 1, Address, City, State and Zip Code.

Some uses include:

- Obtain a list of pregnant women due during a specified time period.
- Obtain a count of pregnant women due who belong to a certain clinic.
- Create labels.

Pregnant Women in Their Third Trimester

Description: A list of pregnant women who belong to the specified agencies and are currently in their third trimester.

Columns (depending on the report tabs): SWID, First Name, Last Name, Cert Start, Cert End, EDC/EDD, Agency ID, Mailaddress, Mailcity, Mailstate, and Mailzip.

Some uses include:

- Identify pregnant women in their third trimester for contact re: appointments, breastfeeding, etc.
- Create labels.

Second-Time Pregnant Women

Created 2.27.18

Description: Provides a list and count of pregnant women certified at the specified agency during the specified time period who were pregnant for the second time. Participants in Tabs 1 - 4 had a value of zero (0) in the Number of Live Births and Pregnancies More than 20 Weeks fields in the Health Information Previous Pregnancy Info section in HuBERT. Participants in Tabs 5 – 8 had a value of 1 in both of those fields. Counts include: by Clinic where the participant was certified and Race Ethnicity or Cultural Identity, by Clinic and Age at Conception and by Age at Conception and Race Ethnicity or Cultural Identity. Tab 1-List-Zero and Tab 5-List-One have an OPTIONAL input control that allows the report user to limit the output to specific clinics.

Columns (depending on the report tabs): Clinic ID, SWID, Cert Date, DOB, LMP Start Date, Age at Conception, Weeks Gestation at Cert, # of Previous Preg., # of Preg 20 or More Weeks, # of Live Births, and Race/Ethnicity or Cultural Identity

Some uses include:

- Identify participants who are pregnant for the second time whose first pregnancy ended without a live birth for outreach and referral purposes.
- Identify participants who are pregnant for the second time whose first pregnancy ended with a live birth.

Participants – Teens

Certified Teens

Description: A list of women 19 or younger when certified at the specified agency during the specified time period. The report also provides counts by conception age and clinic, WIC Type and race/ethnicity.

Columns (depending on the report tabs): HHID, SWID, DOB, Conception Age, Age at Cert, Cert Date, WIC Type, Ethnicity, Race and Clinic ID.

Some uses include:

- Obtain a list of teens certified at a specific agency during a specific time period for referral purposes.
- Identify clinics that may have more teens.
- Assess breastfeeding/non-breastfeeding status for teens.

Certified Teens - STATE

Description: A statewide count of women 19 and younger when certified during the specified time period. The counts are provided for each agency and include a statewide total by age at conception and WIC type.

Some uses include:

- Identify agencies that tend to have more teens.
- Assess breastfeeding/non-breastfeeding status for teens by agency and for the state.

Referrals

Certified Participants Referred and Not Referred

Revised 11.9.20

Description: A list of participants, based on WIC Type, who were certified at the specified agency during the specified time period and either did or did not receive the specified referral(s). Counts and percentages by Race Ethnicity or Cultural Identity, WIC Type, Certifier and Clinic are also provided. The Reference tab provides a list of Referral IDs and Referral Names (the Referral ID is required to run the report for the list of participants).

Columns (depending on report tabs): Referral ID, Referral Name, HHID, SWID, WIC Type, Certifier, Cert Date EDC, Delivery Date, Race/Ethnicity or Cultural Identity, and Clinic ID.

Some uses include:

- Identify participants who were referred, or not, and staff who provided the referral, or didn't.
- Identify similarities or differences in referrals based on Race Ethnicity/Cultural Identity.
- Identify types of participants receiving referrals or not.

No Record of Specified Referral(s)

Created 3.26.18

Description: Provides lists and counts of participants, by specified WIC Type, who were certified, recertified, or had a Mid-certification Assessment (MCA) at the specified agency during the specified time period who do **NOT have any record** of specified referral(s). The list and count provide the Staff ID of the person who performed the cert or MCA during the specified time period and the type of contact. The Reference tab provides a list of Referral IDs, which are required to run the report. OPTIONAL Input Controls can be used to filter the report output by Clinic ID and Staff ID.

Columns/Rows (depending on report tabs): Referral ID, Referral Name, Clinic ID, Staff ID, Contact Date, Contact Type, HHID, SWID, DOB, WIC Type, Prescreen Date, Agency, Agency TOTAL, New Certs, Recerts, and MCAs.

Some uses include:

- Identify participants who have never received required referral(s).
- Identify staff who didn’t provide the referral(s) at a contact (cert/recert/MCA).
- Obtain count of participants by clinic and staff ID who had contacts but don’t have any record of the specified referral(s).

No Referral(s) at Cert or MCA

Created 3.28.18

Description: Provides lists and counts of participants, by specified WIC Type, who were certified, recertified, or had a Mid-certification Assessment (MCA) at the specified agency during the specified time period who were **NOT** provided specified referral(s) **at the time of contact**. The list and count provide the Staff ID of the person who performed the cert or MCA during the specified time period and the type of contact. The Reference tab provides a list of Referral IDs, which are required to run the report. OPTIONAL Input Controls can be used to filter the report output by Clinic ID and Staff ID.

Columns/Rows (depending on report tabs): Referral ID, Referral Name, Clinic ID, Staff ID, Contact Date, Contact Type, HHID, SWID, DOB, WIC Type, Prescreen Date, Agency, Agency TOTAL, New Certs, Recerts, and MCAs.

Some uses include:

- Identify participants who didn't receive specified referral(s) at a contact (cert/recert/MCA).
- Identify staff who didn't provide specific referral(s) at the contact (cert/recert/MCA).
- Obtain count of participants by clinic and staff ID who had contacts but didn't receive the specified referral(s) **at that time.**

Participants with Cert or MCA and Specified Referral

Revised 12.14.16

Description: A list of participants, based on WIC Type, who were certified or had an MCA (Mid-Certification Assessment) performed at the specified agency during the specified time period and received a specified referral. The Reference tab provides a list of Referral IDs and Referral Names (the Referral ID is required to run the report for the list of participants).

Columns (depending on report tabs): Referral ID, Referral Name, HHID, SWID, First Name, Last Name, DOB, WIC Type, Contact Date, Type of Contact, Authorized Rep, Address, City, Zip Code and PMI #.

Some uses include:

- Identify participants who were referred to a specific referral organization during their certification or MCA.
- Obtain a list of referrals specific to an agency.

Referral Contacts

Revised 7.11.17

Description: A list and counts of referrals provided by specified agencies during a specified time period. The counts include by WIC Type, number of households, by Clinic ID, by age category and by Race/Ethnicity or Cultural Identity. An optional Input Control allows the report user to limit the output to referrals documented by specific staff.

Columns (depending on report tabs): Referral ID, Referral Name, Active, Agency, Agency ID, Referral Date, Staff ID, HHID, SWID, First Name, Last Name, DOB, Age, Current WIC Type, Race/Ethnicity or Cultural Identity and Clinic ID.

Some uses include:

- Identify participants referred to a specific referral organization.
- Identify staff who provided referrals.
- Obtain a count of participants by WIC type, clinic, age category and race/ethnicity or cultural identity referred to specific referral organizations.
- Obtain a count of households with members referred to a specific referral organization.

Referral Contact(s) at Any Time & Current Age

Created 2.11.20

Description: A list and count of participants provided specific referrals by specified agencies who were provided the referral at any time. The counts include by WIC Type, number of households, by Clinic ID, by age category and by Race/Ethnicity or Cultural Identity. An optional Input Control allows the report user to limit the output to referrals documented by specific staff.

Columns (depending on report tabs): Referral ID, Referral Name, Active, Agency, Agency ID, Referral, Referral ID, Referral Date, HHID, SWID, First Name, Last Name, M/F, DOB, Age in Months, WIC Type, Race/Ethnicity or Cultural Identity, Lang., Auth Rep FN, Auth Rep LN, Relationship, Telephone, Clinic ID, Address, City, State, Zip Code, and Age in Years.

Some uses include:

- Identify participants, who are of a certain age, who have been provided a referral to a specific referral organization at any time.
- School district geocoding.

Referral Contact(s) during Specified Time Period & Current Age

Created 10.2.18 (Title changed FROM Referral Contacts by Current Age on 2.12.20)

Description: A list and count of participants provided referrals by specified agencies during a specified time period. The counts include by WIC Type, number of households, by Clinic ID, by age category and by Race/Ethnicity or Cultural Identity. An optional Input Control allows the report user to limit the output to referrals documented by specific staff.

Columns (depending on report tabs): Referral ID, Referral Name, Active, Agency, Agency ID, Referral, Referral ID, Referral Date, HHID, SWID, First Name, Last Name, M/F, DOB, Age in Months, WIC Type, Race/Ethnicity or Cultural Identity, Lang., Auth Rep FN, Auth Rep LN, Relationship, Telephone, Clinic ID, Address, City, State, Zip Code, and Age in Years.

Some uses include:

- Identify participants, who are of a certain age, referred to a specific referral organization.

Referral Organizations by Program Topics

Description: A reference list of a specified agency's Referral Organizations, Referral IDs and their status (Active Y/N) grouped by Program Topics.

Columns: Program topics, Referral Names, Referral IDs and Active.

Some uses include:

- Obtain a list of all referrals and their Active status for a specified agency.

Statewide Referral Contacts

Created 5.17.17

Description: A count of participants provided a referral with a specified word in the referral name (such as "DENTAL"). It also provides a count of participants certified during the same time period and a statewide list of all referral organizations.

Columns (depending on report tab): Referral ID, Referral Name, Active, Agency, Agency ID, Referral Contacts (count), and Certified (count)

Some uses include:

- Obtain a statewide count of participants provided a referral to a specific type of referral (examples: dental, child & teen, food shelf, ECFE, etc.).
- Obtain a statewide list of all WIC referrals.
- Obtain a total count of participants certified at agencies during the specified time period.

Risk Factors

Children Assigned RFs 113 & 114 More than One Year Ago

Revised 4.9.18

Description: A list of children who belong to the specified agency and clinic(s) who were assigned risk factors 113 and/or 114 more than 360 days ago. The second tab of the output provides all measurements since the risk factors were assigned.

Columns (depending on report tabs): Clinic ID, SWID, DOB, Current Age, Date RF First Assigned, RF, Gender, Race/Ethnicity or Cultural Identity, HHID, WIC Type, Age RF First Assigned, Most Recent Cert, Last LDTU, Meas. Date, Length/Height, Weight, BMI (if appropriate) and Meas. Age.

Some uses include:

- Identify children who are at risk for overweight or who are overweight.
- Assess effectiveness of intervention/education based on subsequent weight for height and BMI (if appropriate) measurements.

- Assess documentation of children with RFs 113 or 114.

Currently Certified Children Assigned RF 113 & whether Referred to Medical Provider

Revised 4.10.18

Description: This report provides two lists of currently certified children who belong to the specified agency, were assigned risk factor (RF) 113 (Obese – Children 2-5 years old) at their most recent certification, and who have or have not been referred to a medical provider since they were first assigned the RF. It also provides a total count of currently certified children, a count and percentage of those assigned RF 113, and a count and percentage of those referred and not referred.

Columns (depending on report tabs): HHID, SWID, DOB. Age at Cert (in months), Cert Date, Cert End Date, Certifier, First Assigned RF 113, Referral Date, and Race/Ethnicity or Cultural Identity.

Some uses include:

- Obtain a total count of currently certified children
- Obtain a count and percentage of currently certified children assigned RF 113.
- Identify children assigned RF 113 and track whether or not referred to a medical provider since the RF was first assigned.

Food Items Issued on Last Set of Benefits to Participants with Specified Risk Factors

Created 10.31.16

Description: A list and count of participants who had at least one of the specified food times issued on their last set of benefits and were assigned all of the specified risk factor(s) at either a certification or a system-generated pseudo-cert at the specified agency during the specified time period. The report output also includes a count of participants and households; a list and count of participants and households for all agencies in the state; a risk factor (RF) reference with ID, WIC Type, description, whether high risk and expiration date (if applicable); and a food item reference with ID, description and whether the food item is active.

Columns (depending on report tabs): HHID, SWID, WIC Type, High Risk, Cert?, Cert Date, Cert End Date, Last Set's LDTU, Race/Ethnicity, Agency Name, Agency ID, RF ID, WIC Type (RF), RF Description, High Risk (RF), Expiration Date, Food Item ID, Description (Food Item) and Active.

Some uses include:

- Research food package options that sub-groups of participants are receiving.
- Identify whether certain food items are being provided to participants with certain risk factors.

- Obtain a list of risk factors – IDs and descriptions.
- Obtain a list of all food items including ID, description and whether active.

Risk Factor(s) Assigned at Certification

Revised 2.20.18

Description: A list and count of participants who were certified at the specified agency during the specified time period and assigned the specified risk factor (RF), or risk factors, at the time of the certification. The report also provides the following: an agency count and percentage by clinic and WIC type of participants assigned the RF(s) along with the total number certified; an agency count by clinic and race/ethnicity; an agency count by clinic and households; an agency count by staff ID; a statewide count and percentage by agency and WIC type of participants assigned the RF(s) along with the total number certified; a statewide count by agency and race/ethnicity; and a statewide count by agency and households. The last tab provides a reference of RF IDs and RF descriptions.

Columns (depending on report tabs): Agency, Agency ID, Clinic ID, HHID, SWID, WIC Type at Cert, Cert Date, High Risk at Cert, HR Resolved, Race/Ethnicity, Staff ID, WIC Type RF/CERTS, Risk Factor ID and Risk Factor Description.

Some uses include:

- Identify participants assigned a specific RF, or multiple RFs, for a specific agency.
- Obtain a list of participants assigned RF 502 – the only indication that an out-of-state transfer (VOC) was performed.
- Obtain a count of participants assigned a RF, or multiple RFs, by clinic, agency and state.
- Obtain a count of households with a member assigned specified RF(s).
- Obtain a count and percentage of participants certified during the specified time period and assigned the RF(s) by WIC type and clinic or agency.
- Identify staff assigning a risk factor to help assess staff understanding and training needs associated with risk factor.
- Compare agency totals by WIC type and race/ethnicity across the state.

Missing Scanned Documentation for CSP Formula

Revised 3.1.17

Description: A list and total count of participants who were issued benefits for Condition Specific Protocol (CSP) formulas by the specified agency during the specified time period and are missing scanned documentation. (The report identifies all participants issued CSP formula and excludes those who have any of the following text in a scanned document's **Comment** field: sim, total, spit, sensitive, 19, med, mfd, or csp. The assumption being that these participants have the appropriate documentation.)

Columns: SWID, First Name, Last Name, DOB, Issued By, First Issued Date, PFDTU-LDTU and Condition Specific Protocol Formula.

Some uses include:

- Identify participants missing the appropriate and required scanned documentation for CSP formulas.
- Identify staff who issued benefits for CSP formula without appropriate documentation – may require further training.

Participants with Scanned Documents

Description: A list of participants who belong to the specified agencies and have specified types of scanned documents (reference provided) scanned during a specified time period.

Columns (depending on report tabs): Document Type Code, Document Type, Agency, Agency ID, HHID, SWID, First Name, Last Name, Comments, Scan Date, Staff ID and Clinic ID.

Some uses include:

- Identify participants with a specific type of scanned document.

Participants without Scanned Document

Description: A list of participants, based on the specified WIC type(s), who belong to the specified agencies and do not have a record for a specified type of scanned document (reference provided).

Columns (depending on report tabs): Document Type Code, Document Type, Agency, Agency ID, HHID, SWID, First Name, Last Name, WIC Type, Cert Date, Cert End Date, Last Set's LDTU and Clinic ID.

Some uses include:

- Identify participants missing specific types of documentation such as Release of Information or Medical Documentation.

Search or Look-up

First or Last Name Look-up

Description: A list of participants who belong to the specified agency who have a first or last name that matches the specified full, or partial, first or last name.

Columns: Clinic ID, HHID, SWID, First Name and Last Name.

Some uses include:

- Identify duplicate records that have names such as "DUPLICATE" or "DO NOT USE"

Proxy Search

Created 12.13.17

Description: Provides a method for searching the authorized representative and alternative representative fields for specific or partial names or phrases. The report output includes the Clinic ID, Household ID and proxy first names and last names. An OPTIONAL input control allows the output to be filtered by Clinic ID.

Columns: Clinic ID, Household ID, Auth Rep Last Name, Auth Rep First Name, Alt Rep 1 Last Name, Alt Rep 1 First Name, Alt Rep 2 Last Name, and Alt Rep 2 First Name

Some uses include:

- Identify proxy fields with inappropriate information, such as XXX or NO PROXY.

Search by Telephone Number

Description: A list of participants that have a telephone number in the Telephone 1 or Telephone 2 field in Demographics that matches the specified telephone number.

Columns: Agency ID, Clinic ID, HHID, SWID, Participant's Name, Authorized Rep's Name, DOB, WIC Type, Cert Dates, Last Set's LDTU, Address, City, State and Zip Code.

Some uses include:

- Identify participants with a specific phone number (ex: voicemail message left and cannot ascertain name, or no name provided).

Currently Certified Pregnant Women Who Smoke

Revised 3.7.17

Description: A list and count of currently certified pregnant women who belong to the specified agency and are currently smoking at least one cigarette per day. Another tab provides the referrals they've received with the option to specify referrals to assess whether particular referrals are being provided to these participants. The report also provides: an agency count and percentage based on all currently certified pregnant women by clinic; a statewide count and percentage by agency; and a statewide count by agency and race/ethnicity.

Columns: Referral ID, Referral, HHID, SWID, Cert Start Date, Cert End Date, Race/Ethnicity or Cultural Identity, Cigarettes per Day, Referral Date, Count of Currently Certified Pregnant Women Who Smoke, Total Currently Certified Pregnant Women, and Percentage Smoking.

Some uses include:

- Identify currently certified pregnant women who are smoking at least one cigarette per day.
- Assess what referrals are being provided to these participants.
- Assess whether specific referrals are being provided to these participants.

- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women by clinic.
- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women for the state and by agency.
- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women for the state and agencies by race/ethnicity.
- Obtain a count of currently certified pregnant women by clinic, agency, or state.

Postpartum Smoking by Age Category for State and Agencies

Revised 7.5.17

Description: Counts and percentages of postpartum women certified during a specified time period by smoking and age categories for the state and agencies. An optional input control allows the report user to filter the output by agency.

Columns/Rows: Total Certified, Up thru 17 Y.O., 18 thru 34, 18 thru 24, 25 thru 29, 30 thru 34, 35 thru 39, 40 thru 44 Y.O., 18 thru 44 Y.O. and 45 and older, Minnesota WIC, Agency Name, Agency ID, 0 Cigarettes per Day (Non-Smoker), 1 to 9 Cigarettes per Day (less than ½ pack), 10 to 19 Cigarettes per Day (more than ½ pack; less than a pack), and 20 or More Cigarettes per Day (a pack or more)

Some uses include:

- Obtain a count and percentage of postpartum women certified during a specified time period who smoke by age category for the State.
- Obtain a count and percentage of postpartum women certified during a specified time period who smoke by age category for all agencies or specific agencies.
- Obtain a total count of postpartum women certified during a specified time period by age category for the State and agencies.

Statewide Count of Households Assigned Risk Factors for Smoking by Agency

Created 7.7.16

Description: A statewide count and percentage by agency of households with at least one member certified during the specified time period who was assigned risk factor 904 – Exposure to Environmental Tobacco Smoke, risk factor 371 – Maternal Smoking, and risk factors 904 and/or 371.

Columns: Agency Name and ID, HHs with Certified Member, HHs with Member Assigned RF 904, HHs with Member Assigned RF 371, and HHs with Member Assigned RF 904 and/or 371.

Some uses include:

- Obtain a count and percentage of households exposed to environmental tobacco smoke in the home by agency and for the state.
- Obtain a count and percentage of households with a woman who smoked when certified by agency and for the state.
- Obtain a count and percentage of households either exposed to smoke in the home or with a woman who smokes by agency and for the state.
- Compare count and percentages to other agencies or state total.

Smoking Rates for 18-44 Y.O. Pregnant & Postpartum Women by City of Residence at Time of Cert for Specified Agency

Created 7.26.17

Description: Provides a count of 18-44 year-old women certified during the specified time period at the specified agency by their city of residence at the time of their certification and whether or not they smoked prior to pregnancy, while pregnant and when postpartum.

Rows/Columns: Agency TOTAL, City, Certified Pregnant, Pre-Preg. NON, Pre-Preg. Smoker, Pre-Preg. UNK, Pregnant NON, Pregnant Smoker, Pregnant UNK, Certified Postpartum, Postpartum NON, Postpartum Smoker, and Postpartum UNK.

Some uses include:

- Obtain a count of certified pregnant and postpartum women (18-44 y.o.) by their city of residence at the time of their cert for a specified agency.
- Obtain pre-pregnancy, pregnancy and postpartum smoking rates for women 18-44 years-old who were certified during the specified time period at the specified agency.

Statewide & Agency Smoking Rates for 18-44 Y.O. Pregnant & Postpartum Women by Race/Ethnicity

Created 7.26.17

Description: Provides a count of 18-44 year-old women certified during the specified time period at the specified agency by Race/Ethnicity and whether or not they smoked prior to pregnancy, while pregnant and when postpartum.

Rows/Columns: State, Agency, Race/Ethnicity, Certified Pregnant, Pre-Preg. NON, Pre-Preg. Smoker, Pre-Preg. UNK, Pregnant NON, Pregnant Smoker, Pregnant UNK, Certified Postpartum, Postpartum NON, Postpartum Smoker, and Postpartum UNK.

Some uses include:

- Obtain a count of certified pregnant and postpartum women (18-44 y.o.) by Race/Ethnicity for the state or a specific agency.

- Obtain pre-pregnancy, pregnancy and postpartum smoking rates for women 18-44 years-old who were certified during the specified time period.

Smoking

Currently Certified Pregnant Women Who Smoke (& Referrals)

Revised 3.7.17

Description: A list and count of currently certified pregnant women who belong to the specified agency and are currently smoking at least one cigarette per day. Another tab provides the referrals they've received with the option to specify referrals to assess whether particular referrals are being provided to these participants. The report also provides: an agency count and percentage based on all currently certified pregnant women by clinic; a statewide count and percentage by agency; and a statewide count by agency and race/ethnicity.

Columns (depending on report tabs): Referral ID, Referral, HHID, SWID, Cert Start Date, Cert End Date, Race/Ethnicity or Cultural Identity, Cigarettes per Day, Referral Date, Referral ID, Referral, Staff ID – Certifier, Currently Certified Pregnant Women who Smoke, Percentage Smoking.

Some uses include:

- Assess what referrals are being provided to these participants.
- Assess whether specific referrals are being provided to these participants.
- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women by clinic.
- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women for the state and by agency.
- Obtain a count and percentage of pregnant women who smoke based on all currently certified pregnant women for the state and agencies by race/ethnicity.
- Obtain a count of currently certified pregnant women by clinic, agency, or state.

Postpartum Smoking by Age Category or State and Agencies

Revised 7.5.17

Description: Counts and percentages of postpartum women certified during a specified time period by smoking and age categories for the state and agencies. An optional input control allows the report user to filter the output by agency.

Some uses include:

- Obtain a count and percentage of postpartum women certified during a specified time period who smoke by age category for the State, all agencies or specific agencies.

- Obtain a total count of postpartum women certified during a specified time period by age category for the State and agencies

Statewide Count of Households Assigned Risk Factors for Smoking by Agency

Created 7.7.16

Description: A statewide count and percentage by agency of households with at least one member certified during the specified time period who was assigned risk factor 904 – Exposure to Environmental Tobacco Smoke, risk factor 371 – Maternal Smoking, and risk factors 904 and/or 371.

Some uses include:

- Obtain a count and percentage of households exposed to environmental tobacco smoke in the home by agency and for the state.
- Obtain a count and percentage of households with a woman who smoked when certified by agency and for the state.
- Obtain a count and percentage of households either exposed to smoke in the home or with a woman who smokes by agency and for the state.
- Compare count and percentages to other agencies or state total.

Statewide & Agency Smoking Rates for 18-44 Y.O. Pregnant & Postpartum Women by City of Residence at Time of Cert for Specified Agency

Created 7.26.17

Description: Provides a count of 18-44 year-old women certified during the specified time period at the specified agency by their city of residence at the time of their certification and whether or not they smoked prior to pregnancy, while pregnant and when postpartum.

Some uses include:

- Obtain a count of certified pregnant and postpartum women (18-44 y.o.) by their city of residence at the time of their cert for a specified agency.
- Obtain pre-pregnancy, pregnancy and postpartum smoking rates for women 18-44 years old who were certified during the specified time period at the specified agency.

Statewide & Agency Smoking Rates for 18-44 Y.O. Pregnant & Postpartum Women by Race/Ethnicity

Created 7.26.17

Description: Provides a count of 18-44 year-old women certified during the specified time period at the specified agency by Race/Ethnicity and whether or not they smoked prior to pregnancy, while pregnant and when postpartum.

Some uses include:

- Obtain a count of certified pregnant and postpartum women (18-44 y.o.) by Race/Ethnicity for the State or a specified agency.
- Obtain pre-pregnancy, pregnancy and postpartum smoking rates for women 18-44 years old who were certified during the specified time period.

Staff Management

Certs & MCAs Completed by the Specified Staff Person

Description: A list of participants who were certified or had an MCA completed at the specified agency by the specified staff person during the specified time period. It also provides a count of certs and MCAs completed by the staff person.

Columns (depending on report tabs): Contact Type, Cert Date, MCA Date, HHID, SWID, Last Name, First Name, Date of Birth, WIC Type and High Risk.

Some uses include:

- Identify participants who've had services performed by a specific staff person for chart/staff audits.
- Assess a staff person's productivity.

Certs & MCAs Completed by the Specified Staff Person – Recent Dates

Created 7.14.15

Description: A list of participants who were certified or had an MCA completed at the specified agency by the specified staff person during the specified time period. It also provides a count of certs and MCAs completed by the staff person. This report differs from the CERTS & MCAS COMPLETED BY THE SPECIFIED STAFF PERSON because it provides the most recent dates for Nutrition Assessment, Nutrition Education and Notes and should only be run for recently completed appointments.

Columns (depending on report tabs): HHID, SWID, Cert Date, Participant's Name, DOB, WIC Type, High Risk, NA Date, NE Date, Note Date, Risk Factor(s) and MCA Date.

Some uses include:

- Identify participants who've had services performed by a specific staff person for chart/staff audits.
- Assess a staff person's productivity.

Daily Staff Productivity

Created 4.23.20

Description: List of contacts - New Cert, Recerts, Mid-Certification Assessments (MCAs), and Nutrition Education Contacts (NECs) – performed by staff based on the specified agency and time period. The output provides a listing of contacts by Staff ID and Date, including the start time of the contact (NECs are based on when benefits were issued). Total counts are provided by Contact Type and Staff ID for the specified time period and by individual date. The output has an OPTIONAL input control to filter the report by Staff ID.

Columns (depending on report tabs): Clinic ID, Contact Date, Contact Time, Contact Type, HHID, SWID, WIC Type, Agency ID, StaffID, and Counts/Total Counts

Some uses include:

- Assess a staff person's productivity.
- Compare productivity of staff people during time period.

Staff & Clinic Productivity

Revised 6.8.20

Description: Lists of participants who were certified, had an MCA completed or were issued benefits at the specified clinics during the specified time period. The report also provides: 1) counts by staff person and clinic where the services were performed, including new certs, recerts, MCAs, total appointments, and nutrition education contacts (NECs); and 2) Cert and MCA start and end times along with the length of the cert or MCA based on when the Guided Script was started and benefits were issued.

Columns (depending on report tabs): Staff Username, Agency ID, HHID, SWID, DOB, WIC Type, Prescreen Date, Cert Date, Cert Start/End Time, Cert Length, Staff ID, Clinic ID, MCA Date, MCA Start/End Time, and MCA Length.

Some uses include:

- Identify participants who've had services performed by a specific staff person for chart/staff audits.
- Assess a staff person's or clinic's productivity.
- Compare productivity of staff people during time period.
- Assess length of certs and MCAs based on when the Guided Script was opened and when the benefits were issued.

Staff Access Logs

Description: A list of login times for a specified staff person working at a specified agency during a specified time period.

Columns: Date, Clinic ID, Opened Module (time), Closed Module (time), Module and Machine ID.

Some uses include:

- Ascertain that a staff person was working in HuBERT during times indicated – staff audit.

Staff IDs & Names

Revised 2.19.19

Description: A list and count of currently active staff whose most recent login was at the specified agencies. Includes the last login date, which displays in red if more than 45 days prior to the current date.

Columns: Agency Name, Agency ID, Staff ID, Last Name, First Name and Last Login (date).

Some uses include:

- Reference to associate usernames with staff names (for Infoview reports, etc.).
- Obtain a list of currently active staff at specific agency.
- Identify staff who should be deactivated.

State Use Questions – Question #1 (Breastfeeding Exclusivity)

Breastfeeding Exclusivity (State Use Question #1) by Race/Ethnicity

Created 4.17.17

Description: This report has three tabs and provides a list, counts and percentages by race/ethnicity of participants born during a specified time period who have an answer to the Breastfeeding Exclusivity State Use Question #1. Input controls can be used to limit the participants to those in selected agencies and clinics.

Columns (depending on report tabs): SWID, Date of Birth, Agency ID, State Use Code, Code Description, Clinic ID, Race/Ethnicity, Description, BF & formula given after discharge, BF & formula give in the hospital, Breastmilk only since birth, NA, Never breastfed, Total (Race/Ethnicity %), and Exclusively BF during hospital stay.

Some uses include:

- Identify participants based on selected answer for State Use Questions #1.
- Obtain state and agency total of breastfeeding exclusivity by Race/Ethnicity.

No Answer to Breastfeeding Exclusivity State Use Question #1

Description: A list of participants who belong to the specified agency, were **born** during the specified time period, and don't have an answer to State Use Question #1. The report also provides a count and percentage by staff who certified the participants and whether the question was answered or not. Lastly, it provides a count and percentage of the answer selected.

Columns (depending on report tabs): Certifier, Clinic ID, HHID, SWID, Participant's Name, DOB and Cert Date.

Some uses include:

- Identify participants who require an answer to State Use Question #1.
- Identify staff who tend not to answer the question regularly and may require more training.

State Use Questions – Question #6 (Cultural Identity)

Incorrect Cultural Identities

Description: A statewide list of Asian Non-Hispanic and Black Non-Hispanic participants who, regardless of certification status, currently belong to the listed agency and have a potentially incorrect Cultural Identity selected for State Use Question #6. (Asian NH with cultural identities typically associated with Black NH and Black NH with cultural identities typically associated with Asian NH.)

Columns: Agency Name, Agency ID, Clinic ID, HHID, SWID, WIC Type, Race/Ethnicity, Cultural Identity Selection, Cert Date, Cert End Date and Last Set's LDTU.

Some uses include:

- Identify participants with potentially incorrect cultural identities selected based on their race/ethnicity.
- Correct cultural identities as appropriate to help clean up data provided in Infoview reports.

No Answer to State Use Question #6 (Cultural Identity)

Description: A list of currently certified participants who belong to the specified agency, have a race/ethnicity of Asian/Non-Hispanic (202) or Black/Non-Hispanic (203), and do not have an answer to State Use Question #6.

Columns: HHID, SWID, WIC type, Cert Date, Cert End Date, Race/Ethnicity, Transfer?, Last LDTU, Appt Date and Clinic ID.

Some uses include:

- Identify participants who require an answer to State Use Question #6.

State Use Question #6 – BF Amount & Formula Issued on Last Set of Benefits

Description: A list of infants who belong to the specified agency and have a race/ethnicity of Asian/Non-Hispanic (202) or Black/Non-Hispanic (203) by BF amount and the amount of formula on the last set of benefits issued. The report also provides a count by cultural identity and BF amount; race/ethnicity (202 or 203), cans of formula and BF amount, and; cultural identity, cans of formula and BF amount.

Columns (depending on report tabs): BF Amount, HHID, SWID, Selected Culture, DOB, Age, Formula Issued on Last Set of Benefits, Last Set LDTU and Clinic ID.

Some uses include:

- Assess amount of formula provided to infants based on breastfeeding amount and race/ethnicity and cultural identity.
- Use as baseline to determine improvements before and after bf initiatives to reduce formula supplementation.

State Use Question #6 – Certs, MCAs & Ht/Wt

Description: A list of participants who belong to the specified agency and clinics, have a race/ethnicity of Asian/Non-Hispanic (202) or Black/Non-Hispanic (203), and have a height/weight measurement, cert or MCA completed during the specified time period. The list displays the staff person who performed the measurement/cert/MCA and whether an answer was selected for the Cultural Identity question. The report also provides a count by race/ethnicity, cultural identity and clinics and a count by race/ethnicity, staff username and cultural identity for measurements/certs/MCAs completed.

Columns (depending on report tabs): Clinic ID, Race/Ethnicity, HH ID, SWID, DOB, WIC Category, Cultural Identity, Ht/Wt/Date, Ht/Wt Staff ID, Cert Date, Cert Staff ID, MCA Date, MCA Staff ID and Race/Ethnicity Code.

Some uses include:

- Identify participants who don't have an answer to State Use Question #6 and the staff associated with the last participant contact/service.
- Ascertain number of participants who don't have an answer by clinic and staff person.
- Identify staff who may require more training on State Use Question #6.

State Use Question #6 – Low Hemoglobin

Description: A list of participants, by specified WIC Type, with a cultural identity selected who belong to the specified agency and have a hemoglobin measurement taken during the specified time period that is less than or equal to the specified hemoglobin value. The report also provides all hemoglobin records for each participant as well as only the most recent hemoglobin records, beginning with the low value, for each participant.

Columns (depending on report tabs): Agency, Agency ID, Race/Ethnicity, Race/Ethnicity Code, HHID, SWID, Cultural Identity, DOB, Age at Measurement, Staff ID, Measurement Date, Hgb Value, WIC Type at Measurement, Measured at Cert/Recert, Current Cert Start Date, Current Cert End Date, Current WIC Type, Currently High Risk, Clinic ID, WIC Type at Measurement, Month b/n Measurements and Hgb Change b/n Measurements.

Some uses include:

- Identify participants with low hemoglobin for chart audits or follow-up.
- Assess amount of change between measurements.
- Review all hemoglobin records to determine whether WIC intervention has been successful.

State Use Question #6 – New Participants

Description: A list of new participants (prescreen date within 30 days of cert date) who belong to the specified agency and clinics, have a race/ethnicity of Asian/Non-Hispanic (202) or Black/Non-Hispanic (203), and have a cert completed during the specified time period. The report also provides a count by race/ethnicity, cultural identity and clinic and a count by race/ethnicity, staff username and cultural identity.

Columns (depending on report tabs): Clinic ID, Race/Ethnicity, HHID, SWID, DOB, WIC Category, Cultural Identity, Cert Date, Cert Staff ID, Prescreen Date and R/E Code.

Some uses include:

- Identify new participants who don’t have an answer to State Use Question #6 and the staff associated with the cert.
- Ascertain number of new participants who don’t have an answer by clinic and staff person.
- Identify staff who may require more training on State Use Question #6.

State Use Question #6 – Total Counts

Description: Provides total counts of currently certified participants who belong to the specified agency and clinic(s), and identify as Asian Non-Hispanic (NH) or Black/African American NH, by selected Cultural Identity (CI) and Zip Code, WIC Type and Clinic.

Columns/Rows: Total Certified, Up thru 17 Y.O., 18 thru 34, 18 thru 24, 25 thru 29, 30 thru 34, 35 thru 39, 40 thru 44 Y.O., 18 thru 44 Y.O. and 45 and older, Minnesota WIC, Agency Name, Agency ID, 0 Cigarettes per Day (Non-Smoker), 1 to 9 Cigarettes per Day (less than ½ pack), 10 to 19 Cigarettes per Day (more than ½ pack; less than a pack), and 20 or More Cigarettes per Day (a pack or more)

Some uses include:

- Obtain total counts of currently certified by Asian NH and Black/African American NH participants by zip code and Cultural Identity for geocoding.

- Ascertain total number of currently certified Asian NH and Black/African American NH participants being served by a clinic by Cultural Identity.
- Ascertain total number of currently certified Asian NH and Black/African American NH participants being served by WIC Type and Cultural Identity.

Statewide Monthly Participation for Asian Non-Hispanic by Cultural Identities, Months of Prenatal Participation & Breastfeeding Amount

Created 9.15.16

Description: A statewide, and agency, count and percentage for the specified participation month of postpartum women whose race/ethnicity is either Asian Non-Hispanic or Latino (202) or Native Hawaiian or Other Pacific Islander Non-Hispanic or Latino (204) and who have a Cultural Identity selected for State Use Question #6. Breastfeeding and Non-breastfeeding women are categorized based on whether they were on WIC during their pregnancy. Breastfeeding women are further categorized based on whether they were counted as Fully, Mostly or Some Breastfeeding.

Columns: Agency Name and ID, HHs with Certified Member, HHs with Member Assigned RF 904, HHs with Member Assigned RF 371, and HHs with Member Assigned RF 904 and/or 371.

Some uses include:

- Obtain a monthly count and percentage of Asian postpartum women by Cultural Identify for an agency or the state.
- Obtain a monthly count and percentage of Asian breastfeeding vs. non-breastfeeding women by Cultural Identity for an agency or the state.
- Obtain a monthly count and percentage of Asian breastfeeding women who are fully, mostly or some-breastfeeding by Cultural Identity for an agency or the state.
- Obtain a monthly count and percentage of Asian postpartum women by Cultural Identity who were on WIC for more than 3 months, less than 3 months, or not on WIC during their pregnancy for an agency or the state.
- Compare agency to state percentages.

Statewide Monthly Participation for Black Non-Hispanic by Cultural Identities, Months of Prenatal Participation & Breastfeeding Amount

Created 9.15.16

Description: A statewide, and agency, count and percentage for the specified participation month of postpartum women whose race/ethnicity is Black or African American Non-Hispanic or Latino (203) and who have a Cultural Identity selected for State Use Question #6. Breastfeeding and Non-breastfeeding women are categorized based on whether they were on

WIC during their pregnancy. Breastfeeding women are further categorized based on whether they were counted as Fully, Mostly or Some Breastfeeding.

Some uses include:

- Obtain a monthly count and percentage of Black postpartum women by Cultural Identify for an agency or the state.
- Obtain a monthly count and percentage of Black breastfeeding vs. non-breastfeeding women by Cultural Identity for an agency or the state.
- Obtain a monthly count and percentage of Black breastfeeding women who are fully, mostly or some-breastfeeding by Cultural Identity for an agency or the state.
- Obtain a monthly count and percentage of Black postpartum women by Cultural Identity who were on WIC for more than 3 months, less than 3 months, or not on WIC during their pregnancy for an agency or the state.
- Compare agency to state percentages.

Terminated/Ineligible

Terminated & Ineligible by Staff

Description: A list of participants who were certified at the specified agencies and determined ineligible, or whose certification was subsequently terminated, by a WIC staff person during the specified time period. The report also provides a count of termination reasons by WIC type and race/ethnicity and a count of ineligibility reasons by WIC Type and race/ethnicity.

Columns (depending on report tabs): Agency, Agency ID, Clinic ID, HHID, SWID, WIC Type at Cert, Termination Date, Termination Reason, Terminated By, Ethnicity/Race, Ineligible Date, Ineligibility Reason and Made Ineligible By.

Some uses include:

- Identify participants terminated or determined ineligible for staff/chart audits.
- Ascertain the number of participants terminated or determined ineligible during a time period.
- Ascertain the reasons why participants are being terminated or determined ineligible.

Terminated, Ineligible, & Categorically Ineligible by Staff or System

Revised 12.11.19

Description: Lists and counts of participants who belong to the specified agencies and have been terminated, determined ineligible or become categorically ineligible during the specified time period (either by staff or automatically by the system). Counts are provided by reason and clinic, WIC Type, and race/ethnicity. An optional Input Control allows the report user to filter the Tabs 1 and 2 by Termination Reason.

Columns (depending on report tabs): Agency ID, Clinic ID, HH ID, SWID, First Name, Last Name, Authorized Representative, WIC Type, Telephone Number, Termination Date, Terminated By, Termination Reason, Cert End Date, Race/Ethnicity, Residential Address, City, State, Zip Code, Ineligibility Date, Inelig. Determined by, Ineligibility Reason, and Categorical Ineligibility Date.

Some uses include:

- Ascertain the number of participants terminated or determined ineligible.
- Identify staff determining participant ineligibility for auditing purposes.
- Ascertain the reasons why participants are being terminated or determined ineligible.
- Obtain the number of participants who will be categorically ineligible during a time period for caseload management (how many new participants needed).
- Identify participants terminated by the system that may still be eligible for WIC services.

Vendors

New Stores, Disqualifications, and Terminations

Description: This report provides list of new vendors and all vendors being terminated or disqualified for the entire state.

Columns (depending on report tabs): Vendor ID, Vendor Name, Address, City, Zip, County, Enroll Date, Termination Date and Disqualification Date.

Some uses include:

- Identify new vendors.
- Identify vendors where participants will no longer be able to redeem benefits.

Redemption by County

Created 5.8.18

Description: Provides amount of money redeemed by vendors with stores located in each county based on specified report month(s). An OPTIONAL Input Control allows the report output to be filtered by County.

Columns (depending on report tabs): County Name and Redemption Amount

Some uses include:

- Obtain a value for benefits redeemed in a county for a specific month, calendar year or fiscal year.

Stores & Pharmacies by County

Revised 4.5.18

Description: Lists of active stores and pharmacies by specified counties. Lists are provided by name and by city. An OPTIONAL input control filters the output by selected cities.

Columns (depending on report tabs): County Name, Store Name, Store Address, City, Zip Code, Telephone #, Pharmacy Name and Pharmacy Address.

Some uses include:

- Obtain a list of WIC-allowed stores in a specific county/city for participants.
- Obtain a list of WIC-allowed pharmacies in a specific county/city for participants.